General Policy Questions

Does the policy apply to...

- all appointments, 9 Mo, 12 Mo, Temporary, Term, Part Time?
  Yes – the policy applies to all appointment types.

- my OSP grants?
  Yes – the policy applies to all University funds, including OSP projects. Your grantor may have restrictions on what travel expenses can be reimbursed and at what amount so be sure to talk to the Principal Investigator on the project for details. For example the Extension SNAP Ed project uses a revised form to capture a reduced mileage rate.

- guests or volunteers?
  Yes

What should pre-approvers of travel look for before approving?

- Estimated costs
- Chartfield for payment
- Business purpose
- Vacation in conjunction with business leave comparison
- Driving vs. flying comparison when someone is submitting to drive to a non-contiguous state.
- Extras on airfare itinerary that aren’t allowable

Airfare Restrictions

Are service fees from travel agencies allowable?
Yes – booking fees are allowable, but it is preferred that you use the university – preferred travel agency for airfare.

What if preferred seating is the only seat available on the plane?
The expense is still not reimbursable. The travel office recommends booking without an assigned seat or booking through the university-preferred travel agency.

What if I need an accommodation but I don’t have a disability?
Work with the ADA office for all needed accommodations.

Where can I find backup for airfare expenses?
Ask the traveler to email you the final itinerary/bill, for Concur travel you could also become a Travel Assistant for employees in your department so you could access the information online. [https://osutravel.osu.edu/book-online/concur-reference/](https://osutravel.osu.edu/book-online/concur-reference/)

Vacation in conjunction with business trip

Does documentation of the room rate need to be included in the pre-trip information if I am traveling with a guest?
Yes – you should confirm with the hotel whether they charge extra for an additional person in the room prior to traveling.

Parking

Guide: Transportation to the departure airport will only be reimbursed up to the equivalent of mileage reimbursement for one round trip to the departure airport less normal commute if required plus long term surface lot parking.
What parking am I allowed to use at the airport? Any long term surface lot is allowable.

**Mileage**

Should I use the new form for one trip (such as to and from the airport)?

The form is designed for multiple trips; those submitting mileage to and from the airport on a travel reimbursement can still just include a map as long as the normal commute deduction is documented.

Chartfield was removed from the log, where do I enter that?

The Chartfield is entered either on the blanket travel request form or entered into the eRequest system when submitted.

- Some units need to switch Chartfield from the blanket travel or want to track the Chartfield on the form – use the Internal Comments field.

How do I flag paperwork as needing fast processing (when submitting paper)?

Use the Internal Comments field to flag the physical paperwork if it is for a student or needs to be processed faster than normal.

Should I use this log for OSP mileage?

This log should be used for OSP mileage – but that mileage must be submitted separately from your UNIV mileage.

- SNAPed employees use a different version of this log.

Should I submit multiple logs if I have multiple Chartfield to use?

All UNIV mileage should be submitted on one form regardless of how many Chartfield in order to prevent duplication of reimbursement.

**Mileage Examples and Questions**

For the purposes of these examples:

- HQ = Headquarters or Primary Work Location
- OW = One Way trip

---

**To and From HQ**

No mileage is reimbursable on any day of the week.

10 miles one way (OW)

Not HQ
Notes:

- If the trip occurs over two days, only one round trip commute must be deducted. Not one for each day.
- If one leg of the trip occurs on a weekend and one occurs on a weekday just one one-way commute should be deducted.
- If multiple trips are taken in a day only one round trip commute must be deducted.
**Multiple Stops**

**Deduct 1 way commute**

10 OW → HQ → 15 OW

40 OW

2 OW → Not HQ → 5 OW

**Notes:**
- If you have three HQs, send examples to cfaesbusiness@osu.edu for clarification.

**Two Offices**

**Deduct No Commute – claim miles between HQ**

10 OW → HQ → 43 OW → HQ → 60 OW

**Notes:**
- If you do the same work for both HQs (ex. 50/50 appointment) and you can't determine which day belongs to which HQ then the days of the week need to be pre-assigned to an HQ. Seek clarification from cfaesbusiness@osu.edu.
Policy

Discount Programs
Preferred Travel Agencies
Concur Online Booking Tool
eTravel System
  - Travel Requests
  - Payment Requests
  - Approvals
Sponsored Travel

Policy

What is an “R” number?
Prior to your travel request being approved, the eTravel System assigns an “R” number to the travel request for tracking purposes. The “R” number is not an authorization for any payment.

What is a “T” number?
Upon approval, all travel requests in the eTravel system are assigned a unique “T” number. The “T” number is used to authorize use of the university procurement methods (e.g. PCard or PO or through the travel system) for advance payments and reimbursements associated with travel.

If I am using a university procurement method to pay for any travel expenses, do I need a T Number?
Yes, any travel related expense made with a university procurement method (e.g. PCard, PO) must be preceded by the initiation and approval of a T Number.

When is a T Number required?
A “T” Number must be approved in the travel system by a designated approval authority prior to the trip in order to process any payment using university procurement methods (e.g. PCard, PO or through travel system).

What is required to document preapproval for business travel?
Approval for university business travel and estimated costs must be documented prior to the trip. This approval may be noted by an internal form, email, approved T Number or other equivalent documentation that would be available for audit and review. Preapproval for business travel is required regardless of whether university procurement methods are being used for advanced payments.

Disclaimer: The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office (travel@osu.edu).
**Best Practice Tip:** It is a recommended best practice to initiate a T Number (travel request) for all travel, regardless of payment sources, to ensure the traveler can be tracked in the event of emergency circumstances.

Is there a preapproval distinction between traditional business trips (which are eligible for certain university-paid expenses) and trips from one’s headquarters to accomplish what are typically considered “normal workday activities” (such as routine meetings/errands)? An area’s approval authority can reasonably designate which types of trips constitute “normal workday activities.” These trips are generally distinguished by having expense eligibility limited to miscellaneous reimbursements such as parking and tolls - and would not be considered business travel status with its required preapproval.

What business travel expenses are eligible for advance payment by the university?

- Airfare
- Registration

**Note:** Expenses that include any portion associated with personal/vacation costs are prohibited from advance payment using the university's procurement methods (e.g. PCard, PO). Incurred expenses (e.g. per diem) are not eligible for advance payment and should be processed after the trip as a reimbursement.

What is the difference between an Advance Payment, Direct Bill and a Cash Advance?

- **Advance Payment** (also referred to as prepayments) is a payment made in advance of the trip with university procurement methods (e.g. PCard, PO or travel system), for a travel-related expense. Common examples include airfare and registration payments.

- **Direct Bill** is a process in which the travel agency (or other travel entity), advances payment on behalf of the university upon completion of the expense and bills the university for that payment. The travel expenses are typically not billed to the agency until after the stay, service or use has been completed. Common examples include hotel and rental car payments.

- **Cash Advance** is funding disbursed to the traveler’s personal account (or by check when applicable) before the trip to pay certain travel expenses while in travel status. Eligibility for a cash advance is based upon criteria associated with student and/or international travel. Funding must be specifically documented with receipts and excess amounts returned within 30 days of the trip. Common travel expenses supported by cash advances include student group meals, museum entry fees, etc.
Can a traveler be reimbursed for expenses that will later be paid by a third party?
The university will not make advance payments or reimburse travel expenses that have been or will be reimbursed to a traveler by a third party. A third party may include a supplier, host institution or other source assuming responsibility for specific expenditures associated with the travel. Amounts to be paid by the third party entity must be referenced in the travel system for auditing purposes.

If a trip’s total expenses exceed the original approved estimate by 20% or more, do I need to record that trip as an exception?
No. If the total expense amount is appropriate, yet exceeds the original estimate by 20%, the arranger can make applicable adjustments to the expense lines and document the details in the comment section of the travel request for auditing purposes. The designated approval authority must authorize the increased amount on the Travel Request.

Who is responsible for submitting travel reimbursement expenses within the 90 day window established by the university’s accountable plan?
According to the IRS Accountable Plan publication 463, the traveler is responsible for adequately accounting for travel expenses within the university’s established accountable plan window of 90 days after the expenses were paid or incurred. To meet the university’s requirement, the traveler must submit receipts and other related reimbursement documentation to the appropriate unit processor within 90 days of completion of the trip.

What restrictions might apply to traveling overseas with equipment or data?
Traveling with computers, web enabled cell phones, advanced GPS units, scientific equipment, proprietary information or unpublished data may require an Export Control License. The travel system will automatically notify the Office of Research Compliance when International travel is initiated in order to coordinate specific restrictions and guidance with the traveler.

Can I accrue frequent flyer miles from my business travel?
Yes. In accordance with the State of Ohio Ethics Commission rulings, university travelers can only redeem frequent flyer miles for university related business travel (no personal benefit is permitted). It is the traveler’s responsibility to track accrual/usage of these benefits for auditing purposes.

Can I combine vacation time with a business trip?
Travelers may combine vacation time with a business trip, but should consult with their supervisor before initiating arrangements. When arranging travel in these instances, travelers must ensure that arrangements are made in such a way that stewardship of university resources and administrative time is the priority. Travelers incurring additional costs by taking vacation in conjunction with business travel must pay for the costs of travel and other expenses with personal funds and request...
reimbursement for the business travel costs after completion of the trip. Travel expenses to and from alternate vacation destinations occurring before, during, or after university business travel are not eligible for payment with university procurement methods. In cases when vacation time is added to university business travel, any cost variance in expenses such as airfare, vehicle rental, and/or lodging must be clearly identified and documented in eTravel, to validate that the vacation time does not add additional cost to the university.

**What documentation do I need if I will be combining business travel with vacation travel?**

When combining a vacation with business travel, only those expenses directly related to the business travel can be paid/reimbursed by the university. Travelers must ensure that all business related and vacation expense variances are clearly documented and available for audit review. It is best practice to keep all business related expenses separated when possible; this ensures that documentation is as clear as possible. When this cannot be done (e.g. Airfare), cost comparisons should be done to show the pricing differences as if only business time was included. Cost comparisons should be conducted at the same time the expenditure of funds occurs and must be clearly documented and available for audit review. Expenses such as parking and Per Diem will be prorated and limited to only the business travel date/time.

**Can I upgrade my coach airfare to priority boarding or an upgraded seat?**

No. Economy plus, seating upgrades, and/or pre-boarding options are not permitted to be purchased with university resources and will not be reimbursed for coach fares.

**Note:** When applicable, requests for reasonable accommodations for a disability will be considered by units in consultation with the [Americans with Disabilities Act (ADA) coordinator.](mailto:ada-osu@osu.edu) To determine eligibility, travelers must submit a [Reasonable Accommodations Request](mailto:ada-osu@osu.edu) that identifies the personal need and provide related documentation to support the request (e.g. letter from physician) for expenditures outside of policy. Requests should be submitted prior to the scheduled trip and allow sufficient time to gather required documentation.

For more information, contact the ADA Coordinator’s Office at 614-292-6207.
Submit request to: [ada-osu@osu.edu](mailto:ada-osu@osu.edu)

**Can I purchase an upgraded seat instead of the business class airfare permitted with an international flight that meets the five consecutive flight hours criteria?**

Business class airfare purchases are only permissible with international flight times in excess of five consecutive hours (excluding layovers), however a lower priced economy seat with a seating upgrade may be purchased in lieu of the business class flight as long as the cost does not exceed the business class option quoted at the original purchase.
! Note: An upgraded economy seat instead of a business class seat may be considered an adequate option for an International flight that is more than five consecutive hours. In many cases, the cost of the upgraded economy fare is less expensive than the business class fare that is eligible with an international flight of more than five hours. Comparison quotes should be collected at time of original booking to ensure the upgraded economy fare is less than the most reasonable business class option that meets the business needs of the traveler. A screenshot image of the comparison fares and relevant details should be taken to properly justify the selection.

What is the University best practice for navigating the various airfare classes?
Travelers should book the lowest cost Economy or Coach Class airfare that fits the business needs of the trip. The best practice for travelers would be to consult with the university preferred travel agency for airfare bookings. The preferred agency is aware of OSU’s policy regarding airfare purchases, and provides the industry expertise to help travelers navigate the booking process.

How a mileage reimbursement is calculated when my normal home to work commute includes alternate destinations?
The travel policy limits reimbursable miles to the number driven in excess of the number of miles involved in the individual's daily commute (round trip) for work. This calculation applies even in cases where the individual does not normally drive to the primary work location. This calculation does not apply if the individual drives to a place other than the usual work site on a non-normal workday.

! Best Practice Examples: See Mileage Best Practice Graphic Guide

Example A: Joe generally drives 13 miles to and from his usual work site on Main Campus in Columbus for a normal round trip commute of 26 miles. Today, however, Joe needs to drive from his home to the Mansfield Campus to attend an early morning meeting (66 miles). After the meeting, he continues to his primary work location (69) where he completes his work day and then drives home. As a result, today Joe drives 148 miles - from home to Mansfield to his office and back to his home. Joe can request reimbursement for 122 miles today. This represents the number of miles that he drove in excess of his usual round trip commute (66+69+13-26=122).

Example B: Sue drives to her Main Campus office on Monday morning, leaves to attend a required function in Newark, and returns to the office. She can request reimbursement only for those miles driven in excess of her normal commute, in this case, the drive to Newark and back to Main Campus.

Example C: Jake usually drives 14 miles round trip to his work site on Main Campus. His normal work schedule is Monday through Friday. On Sunday evening he drives 27 miles to Columbus Airport to catch his flight to an out-of-state conference. Jake can request reimbursement for all 27 miles driven this day, since it is not a normal work day and he is not
Travel Best Practice Guide and FAQ

If I use my personal vehicle for business travel, should I contact my insurance company before the trip?
Yes. Use of a personal vehicle for business purposes may be excluded on the average private insurance policy. Additional coverage may need to be purchased to cover specific circumstances and requirements. Employee and guest travelers are advised to check with their insurance company for provisions and rates to cover such activity.

For more information visit the Office of Risk Management: [http://u.osu.edu/treasurer/risk/insurance/](http://u.osu.edu/treasurer/risk/insurance/).

! **Best Practice Tip:** Consider using the Enterprise/National vehicle rental contract in lieu of personal vehicle for business travel. Costs are considerably less expensive and the insurance is included in the rate.

If I use my personal vehicle for business travel, whose insurance assumes primary liability?
In the event an injury or accident occurs during business travel status, while in a private vehicle (OSU non-owned), the vehicle driver’s insurance company assumes primary liability for personal injury or property damage incurred by the accident. Primary insurance coverage follows the vehicle’s owner. If this occurs during business travel, injuries to employees may be covered by Worker’s Compensation. Injuries to other parties would fall under the driver’s insurance policy or other insurance such as health insurance of the individual injured. Any private insurance used will have its own deductibles. The University policy may be excess to the owners policy. For more information see the Auto Insurance Fact Sheet or visit the Office of Risk Management website: [http://u.osu.edu/treasurer/risk/insurance/](http://u.osu.edu/treasurer/risk/insurance/).

What documentation is required in order to be reimbursed mileage for business travel using a personal vehicle?
For one-time trips between two primary destinations, an online map source (e.g. MapQuest or Google Maps) is the best source of address-to-address documentation. When traveling to multiple destinations, or travel covering a wide range of dates (for the same business purpose), a log including odometer readings and address-to-address locations are required to document for audit review.

---

**Disclaimer:** The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office ([travel@osu.edu](mailto:travel@osu.edu) or 614/292-9290).
If I am unable to rent with National/Enterprise, and gain the benefits of our contract, what insurances should I purchase?

OSU travel policy requires that any rental car used for university business have Liability Insurance, as well as Damage Waiver or Collision Damage Waiver or Loss Damage Waiver (DW/CDW/LDW). The traveler must provide documentation demonstrating the required insurances were included in the rental on the receipt documentation.

Should I purchase other optional insurances when renting a car for business travel?

University travel policy requires that any rental car used for university business have Liability Insurance, as well as Damage Waiver or Collision Damage Waiver or Loss Damage Waiver (DW/CDW/LDW). When utilizing OSU’s contract through Enterprise or National, these insurances are automatically included in the contract rate. Additional supplemental insurances, such as Personal Liability Insurance (PAI), or Personal Effects Protection (PEP) are not required by the university, nor eligible for reimbursement.

Is the refueling option through the rental car agency an allowable business expense when returning a rental vehicle?

Generally, the traveler should refuel the rental vehicle at a gas station to incur the lowest reasonable costs. However, the refueling option through the rental car agency may be considered when reasonable circumstances occur (e.g. timing issue). The business reason for the use of this option should be clearly documented.

Is there a limit on the nightly lodging rate eligible for travel?

Yes, lodging is limited to one of two rate options, whether being reimbursed or paid by university resources (e.g. PCard or PO).

1. When attending a conference, the conference rate should be considered as the primary option, given that the conference hotel provides the meeting environment, room discounts, meals and eliminates transportation costs from other locations.

2. When a conference rate is not available, lodging selection must be compared to the federal lodging rate published by the General Services Administration. The rate is capped by the threshold of up to twice the federal lodging rate for the business travel location. Note: If the lodging expense falls within the range of 1.5 to 2 times the federal lodging rate, additional justification is required to demonstrate the reasoning for the higher lodging rate selection over comparative locations. The least expensive option must always be considered as long as it meets the business needs of the travel. This threshold is inclusive of the nightly rate only and does not include tax or other hotel specific fees (e.g. resort fees).
**Best Practice Tip:** If your lodging reservation is 1.5-2 times higher than the federal lodging rate, research your justification comparisons before you travel to ensure you are within policy. Take screenshot images of the comparison locations, provide safety concerns details or additional cost considerations to properly justify the selection.

---

**Do I need an original, itemized receipt to reimburse for a traveler’s meals if less than the Per Diem allowance?**

No receipt is required as long as the amount reimbursed is within the Per Diem allowance of the applicable city location. However, a general description of what was purchased must be documented for auditing purposes (i.e. Breakfast on 6/22, and Dinner on 6/23).

**Why do I need documentation for a meal reimbursement that is less than the Per Diem Allowance, when no documentation is required for full Per Diem?**

The federal Per Diem amount for the applicable city location is an allowance that does not require documentation. When the meal amount is less than the Per Diem allowance, it becomes a reimbursable expense. In order for reimbursements to remain non-taxable, support documentation describing the purchase is required. Therefore, a general description of what was purchased must be documented for auditing purposes (i.e. Breakfast on 6/22, and Dinner on 6/23).

**Would a traveler be entitled to the full Per Diem allowance if a meal were included in the conference fee, served on the plane or provided by other documented circumstances?**

Full meal allowances while on travel status will not be paid if provided through other travel-related purchases (e.g. continental breakfast built into the hotel room rate). The allowance must be adjusted by deducting the appropriate meal percentage (25% - breakfast; 25% - lunch; 50% - dinner) from the full Per Diem allowance for the applicable city location.

**What documentation is needed to document meals or other travel expenses that are included in the conference registration fee?**

Conference documentation, such the agenda, program or itinerary are critical resources in determining eligible payment for meals or other travel expenses incurred while on travel status. Travelers should provide all available resources to assist with the accurate processing of travel payments and reimbursements.

---

**Disclaimer:** The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office (travel@osu.edu or 614/292-9290).
A traveler has multiple small dollar receipts for miscellaneous expenses related to business travel - is a receipt required?

Miscellaneous expenses considered necessary for business travel (e.g. taxi fares, baggage fees, parking, tolls, internet connectivity, Visas, immunizations, etc.) may be reimbursed without a receipt for each individual expense that is $50 or less. However, a detailed description (e.g. “taxi fare to and from JFK airport”) and associated business purpose for the expense must be documented for auditing purposes. Individual expenses in excess of $50 require an original, itemized receipt.

! Note: Travel related expenses that are specifically noted in the Procedure Section of the Travel Policy (e.g. airfare, hotel, rental car, et al) have specific documentation requirements and should not be included as a miscellaneous expense.

Discount Programs

Does OSU receive any discounts for travel related expenses?

Yes, note the following discounts programs:

**Airline Discounts:** OSU has negotiated discounts with American Airlines, United Airlines, Southwest Airlines, and Delta Airlines. Flights for OSU business travel are eligible to these discounts when they are booked using the university’s preferred travel agencies. Discounts are based upon market pair and/or service class designations. Book with the university’s preferred travel agency via a full service agent or online.

**Rental Car Discounts:** OSU has negotiated pricing (inclusive of the required insurances) with Enterprise Holdings Inc., which operates both the Enterprise and National rental car brands. This discount can be obtained for OSU business travel by using the OSU discount code. Reserve with no service fee with the university’s preferred travel agency via a full service agent or online.

For other travel related discounts, visit the Travel Website: [https://osutravel.osu.edu/discounts/](https://osutravel.osu.edu/discounts/)

**Why do I have to use the university’s preferred travel agencies to be eligible for OSU’s airline discounts?**

Applying the discount to the fare reservation is limited to the GDS (Global Distribution System) associated with the travel agency, which permits the airline to connect the purchase to OSU. As the OSU business spend increases, the university can leverage more substantial discounts in the future.
Where can I verify discount rates and conditions for the university’s Rental Car Contract?
Specific contract details, including daily/weekly rates, applicable surcharges, and other useful information can be found in the Agreement Summary and FAQ at the Travel website.

Can I utilize any of the university’s discount programs for personal/leisure travel?
Yes, discount rates are available for personal/leisure vehicle rentals through the university’s Enterprise/National agreement, using the Customer Code #XZ38140 (PIN# STA). Insurance is NOT included in the rate. The young renter fees for drivers that are between 18-25 is NOT waived. For more detailed information, refer to Human Resources Discount Community Events: https://hrtech.osu.edu/discounts/

There are no other travel discounts programs available for personal/leisure travel.

Are OSU employees eligible for educational or government discount rates for lodging?
When making a hotel reservation, it is worthwhile to inquire about educational, institutional or government rates. As an instrumentality of the State of Ohio, employees of The Ohio State University may be eligible for government rates with business reservations. However, be sure to check with the hotel directly before arrival to determine the discount rate criteria for check-in. In some cases, the OSU BuckID will be accepted in order to receive the government rate, while other hotels may require more specific/official government ID.

Preferred Travel Agencies

Who are the University’s Preferred Travel Agencies?
Two Preferred Travel Agencies are offered to the university community to serve specific travel demographics.

- For Group Business Travel (10+ passengers): Uniglobe Travel Designers
- For Individual Business Travel: Corporate Travel Planners (CTP)

What are the advantages of using the Preferred Travel Agency for my business travel?

- Prepayment option – No out-of-pocket expense to traveler
- Access to extensive airline selection
- Eligible for OSU airline discounts
- Customer service 24/7
- Online Booking available with Individual Business Travel (CTP)
- Lower Service Fees

Disclaimer: The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office (travel@osu.edu or 614/292-9290).
What fees apply when using the Preferred Travel Agency?
Visit the [OSU Travel Website](https://osutravel.osu.edu) for the current Contract Pricing by service category.

What are the booking options available with the Preferred Travel Agency?

- Uniglobe Travel Designers offers agent assisted booking by phone/email.
- Corporate Travel Planners offers both agent assist booking by phone/email, as well as the [Concur Online Booking Tool](https://osutravel.osu.edu).

**Note:** All bookings must be secured with an authorized T# for advanced payment eligibility.

Where do I submit feedback regarding my experience with the Preferred Travel Agency?
The travel office meets regularly with the preferred travel agencies to ensure they are providing the university with the best level of service. We encourage any traveler or administrator to provide feedback regarding their experiences.

The travel agency feedback form is located at: [https://controller.osu.edu/travelfeedback/TrvlFeedback.aspx](https://controller.osu.edu/travelfeedback/TrvlFeedback.aspx)

---

**Concur Online Booking Tool**

**What is Concur?**
Concur is one of the premier higher education booking tools available and is provided with the contract agreement with the university’s preferred individual business travel agency. The tool is designed for users to research fares, adjust selection parameters and finalize their own booking with an authorized T#.

**How do I access Concur?**
The Concur online booking tool can be accessed through the OSU travel website [https://osutravel.osu.edu](https://osutravel.osu.edu). Login to Concur will require your university username (name.#) and password.

**Which browser is recommended for use with Concur?**
The website should work with all up to date browsers. The Travel Office recommends using the latest version of Chrome or Mozilla Firefox.

---

**Disclaimer:** The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office ([travel@osu.edu](mailto:travel@osu.edu) or 614/292-9290).
Can guests (e.g. non-employees) access Concur?
No. Security limitations established by the university will only permit employee access to Concur, using the name./password login. Guests of the university will need to be booked by the unit’s travel arranger in Concur.

! Note: Alternatively, guests may be authorized by the unit to set-up travel arrangements through full service with an agent from the Preferred Travel Agency. To authorize a guest to use agent assisted booking you will need to do send an email from a @osu.edu email account to theohiostate@ctp-travel.com letting them know you are authorizing a guest to book their travel. It is the unit’s responsibility to ensure that the guest traveler is aware applicable university policies.

Can I use Concur to book airfare for another OSU employee?
Yes, however in order to book airfare for another employee, they must assign you as a travel assistant within their Concur profile.

For more information see the guide Completing your Concur Profile located at the Travel Website. (Select: Book Online → Concur Reference/Training)

eTravel System

How do I get access to the eTravel system?
Access to view one’s own travel history is available to all university employees using name./password – go to www.etravel.osu.edu. Specific administrative access roles are determined by the college/vp area for the initiation/approval of travel requests (T#) and payments.

! Note: Training is available at https://carmen.osu.edu.

When is the eTravel system available?
The eTravel system is available 24 hours a day, seven days a week, with a weekly maintenance window on Thursday nights from 7:00 to 8:00 p.m. Occasionally, the eTravel system may be down on Saturday from midnight to 5:00 a.m. for maintenance. See the OCIO System Status Page for information regarding unscheduled downtime.
Travel Requests

Who do I contact to initiate a travel request?
Contact your department to identify your travel arranger or use the notification section of the travel request to search for travel arrangers by name or Org. These individuals can enter travel requests for Ohio State faculty, staff, students and guests.

I need to make changes to my travel request after it is approved; who do I call?
Travelers and travel arrangers can make changes to certain fields in a travel request after it has been approved; some changes may require re-approval.

! Note: Modifications to certain core fields alter the fundamentals of the travel request and cannot be changed after it has been approved. For more information, refer to Travel ASSIST.

When should I select the Group Travel checkbox?
Group Travel should only be selected when the trip is comprised of 10 or more individuals that are traveling together to a common place for a common purpose, sharing the same travel itinerary (e.g. all travelers commuting on the same flight). Selecting the Group Travel checkbox, will limit the travel agency selection associated with airfare estimates to the University’s preferred agency. A list of the traveler names should be provided as an attachment or noted in the comments.

! Note: Group Travel should not be selected for any less than 10 travelers, except when an associated advisor/employee must depart/return by alternative transportation means or schedule, but is still specifically tied to the group trip. Group Travel checkbox selection will allow the single traveler’s transportation to be coordinated with the group by the same travel agency.

When should I select the Blanket Travel Request checkbox?
The Blanket Travel Request checkbox should only be selected when a traveler has a series of in-state trips where expenses are generally limited to transportation expenses (e.g. mileage or parking) within a fiscal year period.

! Note: Due to expenses authorization thresholds and duty of care tracking, Blanket Travel Request should not be used or selected when there are multiple out-of-state travel destinations. A separate and unique travel request (T#) must be created for each individual trip.

Disclaimer: The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office (travel@osu.edu or 614/292-9290).
When do I apply the close/cancel status on a travel request?

- **Closed status** – trip has occurred; no further payments are expected to be processed against the "T" number; this action can be changed by University Travel Office.
- **Cancelled status** – trip did not occur. This action can be changed by the University Travel Office.

How do I request that a closed/cancelled travel request be re-opened?
Contact the University Travel Office at travel@osu.edu to request a closed or cancelled "T" number be re-opened.

Payment Requests

Who do I contact to initiate a payment request?
Contact your department to identify your payment requestor. These individuals can enter payment requests for cash advances, registration prepayments and reimbursements.

How do I process a cash advance?
A cash advance is entered as a payment request in the eTravel system by a payment requestor. After meeting the criteria established in policy, the traveler must certify/sign the cash advance form (generated in the eTravel system) before payment is issued.

How do I reconcile a cash advance payment?
Reconciliation of cash advance funds should be completed upon return from trip. Cash advance payment reconciliation should be noted in the originating payment request by selecting the reconciled box and indicating any repayment amount.

How do I prepay a conference or registration fee in the eTravel system?
A registration prepayment is entered as a payment request in the eTravel system by the applicable payment requestor.

How do I pay for a conference registration if my conference is not listed as a Vendor in the system?
Under the Vendor Maintenance section, select “Add” from the Vendor Action drop down. Fill in the payee/vendor information and process your payment as usual. For conference registrations, the Vendor Setup Form is generally not needed and your payment will automatically be released as a one-time vendor payment. If for some reason the setup form is needed, a representative from AP or OSU Purchasing will reach out to you.

Disclaimer: The information contained herein is intended to serve as a best practice guide to arranging, processing and documenting travel. Any specific situation not covered by the Travel Policy or the content below, should be addressed with your college service center or fiscal office. Additional inquiries can be routed to the Travel Office (travel@osu.edu or 614/292-9290).
If my conference registration form needs mailed with my check, what should I do?

- **UNIV/OSUMC:** Enter your payment request and submit it as normal. Then email a copy of your completed conference registration form to apattachments@osu.edu. Be sure your registration references your T#. AP will then match your check up to your registration form and mail them together.

- **OSP:** Enter your payment request and submit it as normal. Attach a copy of your completed conference registration form to the payment request. OSP will pull the form and mail it with your check.

For travel on sponsored projects, am I required to send all receipts to the Office of Sponsored Programs Travel Office?

Original itemized receipts are required for reimbursement from a sponsored project and should be attached to the Travel Reimbursement within the eTravel system.

! **Note:** Caution should be taken to not attached documents that contain secure data; effort should be taken to redact social security numbers and other secure information.

How do I set up reimbursement payment requests for a blanket travel request?

The payment requestor may set-up one or more payment requests to reimburse the traveler for mileage within the designated date range of the blanket travel request. In order to distinguish between the payments, reference the date(s) and mileage parameters for each reimbursement in the Expense details.

Which AP area will process my payment?

For UNIV and OSUMC payment requests, OSU Central AP will process the payments. For payments on Sponsored Projects, the Office of Sponsored Programs AP area will process the payments.

I need to confirm a payment has cleared that was issued through the travel system; where can I look to determine the status of the payment?

- For payment requests with a business unit of **UNIV** or **OSUMC**: UNIV Accounts Payable processes all UNIV/OSUMC payments; refer to the Financials system and search for the voucher by the business unit of UNIV.

- For payment requests with a business unit of **OSURF**: OSP Accounts Payable processes all OSURF payments: refer to the Financials system and search for the voucher by the business unit of OSURF.
Approvals

What should I do if a travel request or payment request requires immediate approval?
Refer to the route log in the pending travel request or payment request to identify the approver(s). Contact the approver and request that they approve the pending travel request or payment request. If traveling for a sponsored project, contact the Office of Sponsored Programs Travel Office to alert them to any emergency booking requirements.

How do I stop getting emails about approvals?
Approvers may turn off email alerts by updating their preferences in the eTravel system.

Sponsored Travel

What is Sponsored Travel?
Sponsored Travel is a project involving research travel that will be paid, in part or whole, by grant funds that are administered through the Office of Sponsored Programs. These grants will have a business unit of “OSURF” assigned to them in the university’s eTools and Financial System. If you are unsure if your trip is Sponsored or Non-Sponsored, contact your college service center or fiscal office. See Office of Sponsored Programs for general guidelines.

What is a PI?
The Principal Investigator (PI) is the person(s) that monitor the fiscal responsibilities of the grand funds and research associated with the project.

How will a PI know if a travel request has been approved on their project in the eTravel System?
The Principal Investigator (PI) may independently access the eTravel System to monitor the approval status of a travel request. In addition, the PI and other associated users will receive email notifications once a travel request has been approved in the system.
Are there special considerations when flying internationally for sponsored travel?

Yes. The Fly America Act, enacted in 1974, mandates the use of U.S. flag air carriers for federally funded international travel. If you are scheduling international travel that is funded by a federal grant, you must ensure that all flights, where possible, are scheduled on U.S. flag air carriers or on foreign air carriers that code share with a U.S. flag air carrier. See Office of Sponsored Programs for more information.

Where can I find more information about Sponsored Travel?

The travel section of the Office of Sponsored Programs website may be found at the Office of Sponsored Programs website. For more detailed information, contact the Office of Sponsored Programs Travel Office at 614-292-2126 or to OR-travel@osu.edu.