Overnight Travel Pre-trip
Travel Planning

University business travel requires considerable planning to ensure the best experience during the trip and after when reconciling expenses.
When does this policy and procedure apply?

- Overnight trips
- Meals, lodging, airfare
- Business related
- Incidentals and transportation
- Budget allows and unit approved
- > 45 miles from work or home
Traveler initiates and submits travel request → Approver approves travel request → Applicable travel expenses prepaid

Trip occurs → Traveler provides receipts and/or documentation to payment requestor → Payment requestor initiates and submits payment request

Approver approves payment request → Traveler electronically signs payment request if cash advance or reimbursement → Payment is made
Traveler Checklist

- Review the university’s Travel Policy
- Estimate expenses
  - Get travel authorization (T#)
  - Other T Number considerations
- Make reservations
- Preparing for departure
- During the trip
Read the travel policy

Goals:

• Create consistency
  • Applies to all units
  • Applies to all employees, students and eligible guests

• Ensure efficiency

• Ensure the lowest reasonable cost for travel expenses

• Avoid the appearance of impropriety

• Provide reasonable accommodations per the [Americans with Disabilities Act](http://busfin.osu.edu/FileStore/PDFs/211_Travel.pdf)
Take Online Travel Policy Training

Not required, but will cover many common questions

- Travel Policy
- eTravel: Travelers

Carmen.osu.edu

You must self-enroll in these courses. For help with joining a Carmen training course, click here.

If you no longer find the trainings in Carmen – see them in Buckeye Learn, they are likely to transition to Buckeye Learn in FY2017

go.osu.edu/BuckeyeLearn
## Working through the Checklist

### Estimate your expenses

<table>
<thead>
<tr>
<th>Things to consider</th>
<th>Registration Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation or mileage to the airport</td>
<td>Transportation from the airport to lodging</td>
</tr>
<tr>
<td>Parking at the airport</td>
<td>Meals</td>
</tr>
<tr>
<td>Costs of driving vs. flying to a non contiguous state</td>
<td>Fees due to international travel (Passport, Visa, Immunizations)</td>
</tr>
<tr>
<td>Lodging Costs</td>
<td>Tolls</td>
</tr>
<tr>
<td>Airfare/Rail</td>
<td>Service tips</td>
</tr>
<tr>
<td>Luggage Fees</td>
<td>Hotel incidentals (internet, parking)</td>
</tr>
<tr>
<td>Guest expenses – if traveling with a guest</td>
<td>Vacation in conjunction with business</td>
</tr>
</tbody>
</table>
Estimate your expenses

What you need to know before submitting for approval to travel.

✔ Travel departure and return dates
✔ Will the traveler be driving or flying to the location
  • If driving to a non contiguous state complete the Driving vs. Flying Worksheet
✔ Whether the traveler is adding vacation time to the trip
  • If adding vacation time complete the Vacation vs. Business Worksheet
✔ How the trip will be funded
  ✔ University funding Org and Fund
  ✔ Office of Sponsored Program Org and Project ID
  ✔ Third party contributions planned
Driving Vs. Flying

When trying to decide to drive or fly to a non contiguous state all costs should be considered.

The **Driving vs. Flying Worksheet** will be required on the travel request authorization.

The lower cost option must be the cost charged to the university.
- If the traveler decides to drive and it is the higher cost, the traveler will only be reimbursed up to the flying calculation

### Driving
- Mileage or rental car cost
- Estimated fuel Cost
- Tolls
- Extra lodging
- Extra per diem
- Parking at the event

### Flying
- Rental car or taxi/shuttle at the venue
- Airfare quote
- Baggage fees
- Mileage or taxi to the airport
- Parking at the airport
Vacation Vs. Business

• When adding personal time to a business trip the costs of personal travel cannot be paid by the University.
• The [Vacation vs. Business Worksheet](#) will be required on the travel request authorization.
• Only business costs can be charged to the university.
• Personal expenses cannot be pre-paid with university funds.

Considerations:
• Two airfare quotes: One with business travel only and one with personal travel included.
• Extra parking costs at airport
• Additional luggage needed for personal travel
• Extra days/gasoline on rental car or extra shuttle/taxi costs
• Additional multi-occupancy costs at the hotel
• Guest fees on registration expenses
Get Travel Authorization (T #)

The T Number serves as authorization to use university procurement methods to procure travel related expenses.
Traveler Checklist

- Review the university’s Travel Policy
- Estimate expenses
- Get travel authorization (T#)
- Other T Number considerations
- Make reservations
- Preparing for departure
- During the trip
Request a T Number

A T number is a number assigned by eTravel for each approved unique trip. The T Number serves as authorization to use university procurement methods to procure travel related expenses.

eTravel is the University-designated travel authorization and expense system.

All employees have access to enter their own request for a T Number in the eTravel system by signing in with their OSU Internet Username and password.

A T Number is required prior to traveling.

https://etravel.osu.edu
Request a T Number

- [https://etravel.osu.edu](https://etravel.osu.edu)
  - Online eTravel assistance: [https://it.osu.edu/assist/assistTravel/index.html](https://it.osu.edu/assist/assistTravel/index.html)

- Sign in with your OSU Internet Username and Password.
- Click **New** to create a Travel Request.
  This process assigns a T number for your trip.

Use this Search page to look up T#s you previously entered or to check on the status of the current Travel Request.
Request a T Number

Enter your employee id.
- **Travel Arrangers** entering on behalf of others lookup the traveler’s information
- **Travel Arrangers** entering for guests enter the name

Enter a *detailed* Business Purpose.

Note about *Abbreviations* - this list allows users to put abbreviations on forms while still providing auditors with the information they need. Abbreviations should be avoided unless they are on this list.

Want to add an abbreviation to our list?

http://Go.osu.edu/abbreviation

http://Go.osu.edu/add
Request a T Number

• Enter departure date and return date
• Enter departure city and destination city
Request a T Number

Estimated Cost

<table>
<thead>
<tr>
<th>Category</th>
<th>Type</th>
<th>Description</th>
<th>Amount</th>
<th>Add/Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>Airfare</td>
<td>Corporate Travel Planners</td>
<td>1000.00</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>Personal Auto (Mileage)</td>
<td>to/from airport</td>
<td>20.00</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>Shuttle</td>
<td>Prepayment requested</td>
<td>60.00</td>
<td></td>
</tr>
<tr>
<td>Registration</td>
<td>Choose</td>
<td>PCard</td>
<td>550.00</td>
<td></td>
</tr>
<tr>
<td>Lodging</td>
<td>Choose</td>
<td></td>
<td>1000.00</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>Other (Description Required)</td>
<td>Incidentals</td>
<td>150.00</td>
<td></td>
</tr>
<tr>
<td>Meals</td>
<td>Per Diem</td>
<td></td>
<td>248</td>
<td></td>
</tr>
</tbody>
</table>

- Use the plus sign to add all estimated costs. Round up instead of down for estimated costs.
- Select Corporate Travel Planners from the drop down for most airfare expenses.
- Use the calculators for ease in mileage and per diem estimates.
Use the plus sign to add Chartfield and to add multiple Chartfield lines.

Split multiple Chartfield lines by amount or by percentage.

BUGL, ORG, FUND and ACCOUNT are required fields. OSURF=OSP
- Enter OSP Chartfield first if split.

Ask your fiscal support what the Chartfield would be if you aren’t sure.

Look at the approvers listed – Do you see your normal approver listed?

If you do not see your normal approver listed – email your approver with the details of your request. Dates, Amount, Business Purpose and ask for email approval for the trip. You will use this email later.
1. Click Save for later at the bottom of the page.
2. Attachments: Use the plus sign to attach anything that is needed in order to get the request approved.
   - If driving to a non contiguous state attach the Driving vs. Flying Worksheet
   - If adding vacation time attach the Vacation vs. Business Worksheet
     - If not adding vacation time to the trip put a comment in the comments section
     - If the correct approver was not listed in the approver section attach the email approval you received (see previous slide)
3. Click save and continue
Request a T Number Submission

Travel Request Submission

- Request saved, but will NOT be submitted until you click the "Submit" button below.

R # is a preliminary number used for tracking the request.

Action:

- Cancel Submit
- Submit for Approval

Print (PDF)  Print Summary (html)

Messages

Summary

Reference Number: R000413208
Created Date: 03/16/2016
Business Unit: UNIV

T Number: TBD
Status: PENDING
Request a T Number

Once submitted, the eTravel request will be reviewed and approved by one or more of the following individuals.

- Unit budget approver
- Unit business purpose approver
- Business Operations Center representative
- Office of Sponsored Programs travel representative
- Office of Academic Affairs – Required for faculty travel over ten days

Once all required approvals have been completed a T number will be emailed to the traveler from the travel system.
Request a T Number

- Wait, why do I need a T number?
- How do I start a request for a T number?
- How long will it take to get a T number?
- What if I don’t know exact costs?
- Who do I contact if I have a question?

Recap

A T number is a number assigned by eTravel for each approved unique trip. The T Number serves as authorization to use university procurement methods to procure travel related expenses.

eTravel is the University-designated travel authorization and expense system.

All employees have access to enter a request for a T Number in the eTravel system by signing in with their OSU Internet Username and password.

A T Number is required prior to traveling.

https://etravel.osu.edu
Other T number topics

Most T numbers involve the employee submitting an eTravel Request. But there are a few other things to consider.
Traveler Checklist

- Review the university’s Travel Policy
- Estimate expenses
- Get travel authorization (T#)
- Other T Number considerations
- Make reservations
- Preparing for departure
- During the trip
Travel Arrangers have permission to enter travel requests (obtain T numbers) in the eTravel system for faculty, staff, students and guests.

- **Access is optional** and used in units who have a support person who can help organize travel arrangements.

- **Training is required** and must be completed prior to access being granted.

- **Responsibilities**: accurately entering information and uploading needed documents into eTravel on behalf of the traveler.
Request a T Number  What is a Travel Approver

Travel Approvers have permission to approve travel requests (obtain T numbers) in the eTravel system for faculty, staff, students and guests.

• **Access is limited to unit leaders** and is used to approve budget and business purpose.

• **Training is required** and must be completed prior to access being granted.

• **Responsibilities**: approvers are responsible for reviewing basic information submitted on the request. Use the travel approver checklist (next slide) to make sure you are reviewing everything that is needed.
T Number Approver Checklist

- **Estimated Costs:** Do the costs submitted seem reasonable and necessary?
- **Estimated Costs:** Is there available money in the Chartfield?
- **Business Purpose:** Does the purpose of the trip seem reasonable and necessary?
- **Business Purpose:** Are all acronyms spelled out on the request or documented on the acronym list?
- **Vacation:** Did the traveler indicate that there was no vacation time associated with the trip OR attach a Vacation vs. Business Worksheet
  - Review the vacation worksheet and make sure they completed and have attached necessary documentation such as an airfare comparison.
  - Verify that the requested cost on the eTravel screen is the lesser of the two cost options.
- **Driving to a noncontiguous state:** If the traveler is driving to a non-contiguous state did they attach the Driving vs. Flying Worksheet?
  Are they submitting estimated costs at the lower cost rate.
- **Airfare Itinerary:** Review the itinerary if attached and make sure no university funds pay for upgrades.
Request a T Number

What can go wrong

- An incomplete eTravel request will cause the process to slow. Dates, locations, business purpose, estimated costs and Chartfield are all required fields.

- Forgetting to attach the necessary documents for the trip.
  - If driving to a non contiguous state the traveler must attach the Driving vs. Flying Worksheet
  - If adding vacation time the traveler must attach the Vacation vs. Business Worksheet
    - If the traveler is not adding vacation time to the trip put a comment in the comments section
    - If your approver is not listed in the approver section attach the email approval that was received from them.

- Entering the higher cost option from the Driving vs. Flying Worksheet and Vacation vs. Business Worksheet
Request a T Number
What else can I use my eTravel submission for?

The eTravel system can be used to store documents related to the trip for future reference.

- Airfare itinerary
- Rental car reservations
- Hotel room confirmation
- Conference agendas

The system is accessible from any web browser at any time of day.
Make Reservations

This will cover the primary costs associated with traveling including pre-payment options and policy guidance.
Traveler Checklist

▷ Review the university’s Travel Policy
▷ Estimate expenses
▷ Get travel authorization (T#)
▷ Other T Number considerations
▷ Make reservations
▷ Preparing for departure
▷ During the trip
Conference/Event Registration

- Business related banquets or meals that are considered part of the conference can be paid with the registration fee or reimbursed as appropriate with a valid business purpose. These meals must be deducted from the traveler’s per diem allowance.

- Activities such as golf outings, sightseeing tours, spa activities, and other entertainment costs will not be paid by the university.

<table>
<thead>
<tr>
<th>Payment Methods</th>
<th>Documentation Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Pre-payment through eTravel</td>
<td>The conference registration form</td>
</tr>
<tr>
<td></td>
<td>Meeting agenda</td>
</tr>
<tr>
<td>Registration Pre-payment with a UNIV</td>
<td>The conference registration form</td>
</tr>
<tr>
<td>PCard, Sponsored Programs PCard or Extension checking account.</td>
<td>Meeting agenda</td>
</tr>
<tr>
<td></td>
<td>The original, itemized receipt or equivalent documentation</td>
</tr>
</tbody>
</table>

Traveler’s payment with reimbursement post-trip

- The conference registration form
- Meeting agenda
- The original, itemized receipt or equivalent documentation
Conference/Event Registration
Pre-payment through eTravel

Once a T number is assigned email the following information to your Travel Arranger.

If you do not have a Travel Arranger, email to cfaesbusiness@osu.edu

• T Number (or R Number if T number not yet assigned)
• Traveler name
• Amount to pay for registration
• Name and address for registration check to be mailed
• Business purpose for optional events
• Attach the completed registration form to your email.

Allow 7 business days for a check to be mailed to the vendor.
Purchase Airfare

- Lowest coach/economy fare that meets business needs is required
- Seat or fare upgrades, pre-boarding, seat selection costs are not reimbursable.
- First class airfare is prohibited
- Business Class (or less) is permissible with international flights in excess of five consecutive hours.

Payment Methods

| Corporate Travel Planners Online Booking | T number required before booking |
| Agent assisted phone call | Itinerary required at reimbursement |

Documentation Needed

- T number recommended before booking
- Original, Itemized receipt required at reimbursement
- Itinerary required at reimbursement

Traveler’s payment with reimbursement post-trip

Payment to vendor with university funds
Purchase Airfare

- If taking personal time and business time together and the amount of the airfare is more than what it would be for just business travel then do not prepay using Corporate Travel Planners with a T number. Use a personal credit card.
- Airfare is not permitted on an OSP Amex card.
- Some OSP projects require US Air Carriers.

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**Payment Methods**

- Corporate Travel Planners Online Booking
- Agent assisted phone call

**Documentation Needed**

- T number required before booking
- Itinerary required at reimbursement

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Traveler’s payment with reimbursement post-trip

- T number recommended before booking
- Original, Itemized receipt required at reimbursement
- Itinerary required at reimbursement
Purchase Airfare Preferred Method

Corporate Travel Planners

The Ohio State University’s preferred supplier for individual business travel

Full service agent assist: 855-784-9282 or theohiostate@ctp-travel.com
$18.00 domestic/$22.50 Int’l

Online booking via Concur: https://webauth.service.ohio-state.edu/cgi-bin/concur.cgi
$6.30 domestic/$22.50 Int’l
Training available: https://osutravel.osu.edu/book-online/concur-reference/

✓ Saves money
✓ Allows the university to track the travelers location in case of emergency
✓ Prevents booking extras that aren’t payable by the University
✓ Allows the university to pay directly so the traveler doesn’t have to use personal funds
✓ Travelers and Guests can assign a Travel Assistant to help them book travel
Purchase Lodging

- Reasonable, single occupancy or standard business room rate
- Travel must be 45 miles or more from residence or headquarters
- Additional costs on the hotel bill like internet will require a valid business purpose. While reserving space, read through the hotels policies and ask permission prior to departing if you feel you will have a business need for the expense.

<table>
<thead>
<tr>
<th>Payment Methods</th>
<th>Documentation Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase order via Corporate Travel Planners online</td>
<td>• T number required before booking</td>
</tr>
<tr>
<td>Planners online booking tool and eRequest – Standard</td>
<td>• Original itemized invoice</td>
</tr>
<tr>
<td>purchasing request or direct eRequest to vendor</td>
<td></td>
</tr>
<tr>
<td>Purchasing Card (Department or Individual)</td>
<td>• T number required before booking</td>
</tr>
<tr>
<td></td>
<td>• Original, itemized receipt must be scanned and attached</td>
</tr>
<tr>
<td></td>
<td>to the eRequest.</td>
</tr>
<tr>
<td>Traveler’s payment with reimbursement post-trip</td>
<td>• T number recommended before booking</td>
</tr>
<tr>
<td></td>
<td>• Original itemized receipt showing zero balance due</td>
</tr>
<tr>
<td></td>
<td>required at reimbursement</td>
</tr>
</tbody>
</table>
Purchase Lodging Rate Restrictions

Conference rate always allowable

If not using a conference rate:

☑ 0 – 1.5 times the GSA rate allowable
☑ 1.5 – 2 times the GSA Rate allowable with justification
☒ > 2 times the GSA Rate is not allowable

GSA rate: http://www.gsa.gov/portal/content/104877

• Local (Columbus area) hotels may offer discounted rates for University business-related travel. See Contract Book for options.
• Reserving through Corporate Travel Planners may give additional benefits like free internet when otherwise the hotel may not provide it.
• When making reservations inquire about educational institution or government rates.
Rental Car

<table>
<thead>
<tr>
<th>Payment Methods</th>
<th>Documentation Needed</th>
</tr>
</thead>
</table>
| University contracted rental agencies via Purchasing Card (Department or Individual) | • T number required before booking  
• Original, itemized receipt  
• Fully executed rental agreement indicating insurance coverage  
• Gasoline receipts |
| Traveler’s payment with reimbursement post-trip                                   | • T number required before booking  
• Original, itemized receipt  
• Fully executed rental agreement indicating insurance coverage  
• Gasoline receipts |
Rental Car Policies

• Travelers must incur the **lowest reasonable vehicle rental expenses** that meet business needs.

• Damage Waiver or Collision Damage Waiver or Loss Damage Waiver (DW/CDW/LDW) **AND** liability insurance coverage are required.

• The university will **not pay for or reimburse any other type of supplemental insurance**.

• **University contracted rental agencies (Enterprise and National).** Corporate discount numbers must be provided when the reservation is made to access discount/insurance package. Discounts also available for personal travel.
  - Online Booking and Contract Codes: [https://osutravel.osu.edu/discounts/rental-car-discounts/](https://osutravel.osu.edu/discounts/rental-car-discounts/)

• **15 passenger vans are prohibited**
Preparing for Departure

Once reservations are made there are still a few steps to consider before departure.
Traveler Checklist

▷ Review the university’s Travel Policy
▷ Estimate expenses
▷ Get travel authorization (T#)
▷ Other T Number Considerations
▷ Make Reservations
▷ Preparing for Departure
▷ During the trip
What to do before you leave

Share your itinerary
Share your itinerary with your unit and a family member or friend.

Call your Credit Card Company
Call your credit card company or bank and let them know you are traveling. Most have anti-fraud services in place that could interrupt your travel.

Mail
If your residence will be empty while you are gone stop your mail with the postal service.

Double check the dates of all of your reservations
Mistakes happen. Taking a few minutes to fix them before you leave may save time and money while traveling.

Baggage and Equipment
Limit baggage and equipment to the basics needed for the trip. Check the airline’s baggage limits and check-in procedures.
What to take with you

Identification
Take only the identification information that you will need (e.g. driver’s license, passport, visa, etc). To determine what identification is required for the travel destination, contact the airline, travel agency or appropriate government agency.

Financial Resources
Bring multiple forms of money, including traveler’s checks, ATM cards, credit cards, and cash. Do not rely on a single means of accessing funds.

Emergency Contact List
Take a list of emergency contacts, including family members, physicians, and university supervisors.

Medical Insurance Card
Carry your insurance card and important medical information about any significant health issues in the event of an emergency.
Purchasing Cards

Lost/Stolen Cards: [http://controller.osu.edu/pcard/pcard-lost.shtm](http://controller.osu.edu/pcard/pcard-lost.shtm)

Individual Card
Senior Leadership have access to individual PCards. These may be used by them to purchase items and travel needs on UNIV chartfield. Before traveling these individuals should make sure they know who to contact in case the card is lost or stolen.

Department Card
Some units have department PCards which are shared by multiple people in a unit. Most do not allow cards to be taken on trips because then the cards are inaccessible for other users. If you are permitted to take the card on your trip – keep it secure, you are liable for transactions while it is in your possession. The card can only be used for UNIV Chartfields. Original and Itemized receipts must be returned to the PCard Manager immediately upon return. Usually these cards are not permitted for personal meals.

Sponsored Programs PCard
Most sponsored programs PCards do NOT allow for travel. Follow OSP instructions on the use and reporting of expenses for these cards. These should be used for OSP/OSURF chartfields only.
During the Trip

Traveler’s primary responsibility during travel is to stay safe but there are some business things to consider as well.
Traveler Checklist

- Review the university’s Travel Policy
- Estimate expenses
- Get travel authorization (T#)
- Other T Number considerations
- Make reservations
- Preparing for departure
- During the trip
Save all of your receipts

Not all receipts are required, but instead of trying to keep track of which are and which are not we recommend that traveler’s keep all receipts until they return.

Make a designated spot in your luggage and put your receipts in that area daily.

Don’t panic – if you drive through an unmanned toll booth and can’t get a receipt – many times you wouldn’t have needed that receipt anyway.
Food

- In general, per diem is paid for food. This is a daily rate for breakfast, lunch and dinner that varies by location and time of year and is set by the federal government.
- For most people receipts won’t be required for per diem.
- Check out the meal rate for your destination here [http://www.gsa.gov/portal/content/104877](http://www.gsa.gov/portal/content/104877)
- In general, first and last days of travel are reimbursed at 75% per diem but full per diem can be paid in extreme circumstances.
- Remember that if the hotel or airline or conference provides food you are not eligible for that meals per diem even if you choose not to eat the food.
- The per diem also covers some incidentals such as tips, laundry needs, and other personal care items that you will not be reimbursed for separately.
Travel to/from the airport

Mileage

- Reimbursed at the university rate.
- One round trip to and from the airport is allowable.
- If traveling from home to the airport (or returning) on a normal work the traveler’s normal round trip commute must be deducted from the reimbursable miles.
- An online map showing travel route is required.

Taxi/Personal Transportation

- Can be reimbursed up to the equivalent amount of eligible mileage reimbursement and long term surface lot parking.
Fees at the airport

Parking

• Long-term surface lot parking for the duration of the trip is permissible.

• Shuttle service or valet service may be used as long as the cost is comparable to long term surface lot parking costs.

• For Columbus airport, Thrifty and the Parking Spot offer discounted valet type service for The Ohio State University.

• [https://osutravel.osu.edu/discounts/airport-parking-discounts/](https://osutravel.osu.edu/discounts/airport-parking-discounts/)

Luggage

• One bag per business traveler is permissible using university funding. Additional baggage maybe allowable with sufficient justification.

Tips

• Tips for valets, shuttle drivers, etc are considered incidentals and part of the per-diem meal allowance for the day.
From the airport to the hotel and return

**Rental Cars:** In planning the trip the traveler probably chose whether a rental car was needed. In general a shuttle or taxi to the destination is cheaper but if a rental car is needed it can be provided at the discretion of the department.

**Shuttles, Metro and Taxis:** should be used as a cost saving measure in place of a rental car in most instances. When asking for assistance booking these services make sure the concierge or assistant knows you want reasonably priced options. Don’t get stuck with a limousine expense by accident!

**Parking at the Hotel:** Hotels usually have a valet and self-park option. Choose the self-park option as the lowest cost.

**Gasoline:** When refilling the rental car for return choose the most cost effective option to refill. If you added vacation time to your trip try to keep gas receipts for personal and business separate.
At the Hotel

**Additional fees** can often be removed – ask at check in (resort fee, safe fee, newspaper fee)

Shared rooms – If you are traveling with a personal guest, have the hotel confirm at checkout that the rate given in the room is for **single occupancy** and record that on the bill.

Shared rooms – If you are traveling with a business guest, have the hotel **split the bill** at checkout so you each pay with your payment cards.

**Sales Tax** – If you are paying personally you will likely need to pay the state’s taxes. If you are paying with a PCard be sure to get the tax removed.

- Out of state Sales tax: [https://controller.osu.edu/tax/tax-man-state.shtm#2](https://controller.osu.edu/tax/tax-man-state.shtm#2)
- In State Sales Tax: [https://controller.osu.edu/tax/tax-man-state.shtm#2](https://controller.osu.edu/tax/tax-man-state.shtm#2)
- Columbus? Bed Tax Form: [https://controller.osu.edu/forms/forms.shtm#tax](https://controller.osu.edu/forms/forms.shtm#tax)
Traveler Checklist

▷ Review the university’s Travel Policy
▷ Estimate expenses
▷ Get travel authorization (T#)
▷ Other T Number considerations
▷ Make reservations
▷ Preparing for departure
▷ During the trip

Wait! This isn’t the end of the training. You still need to learn how to submit receipts and get reimbursed for personally paid expenses. Look for the Post-Trip training where you found this course. http://cfaesfinance.osu.edu/Training/travel