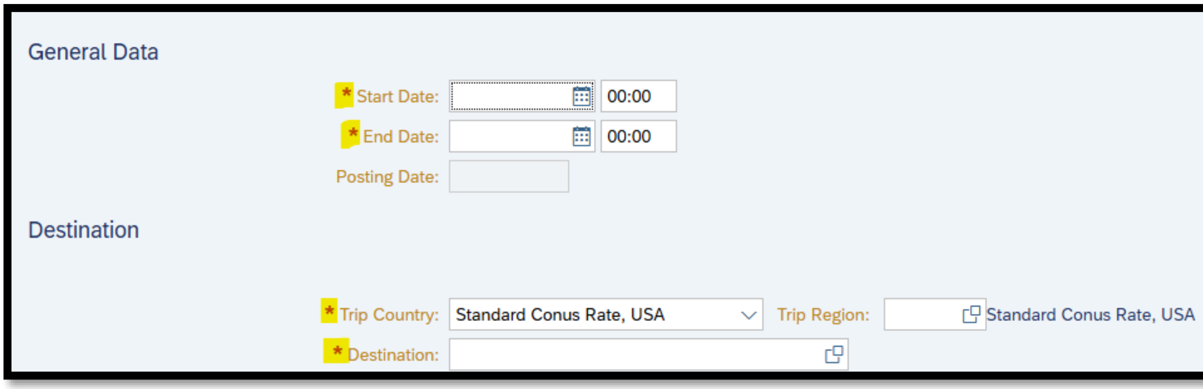
Commonwealth University
TM – Travel Management
Quick Check List

Note that items marked with a * are required fields.



General Data/Dates:

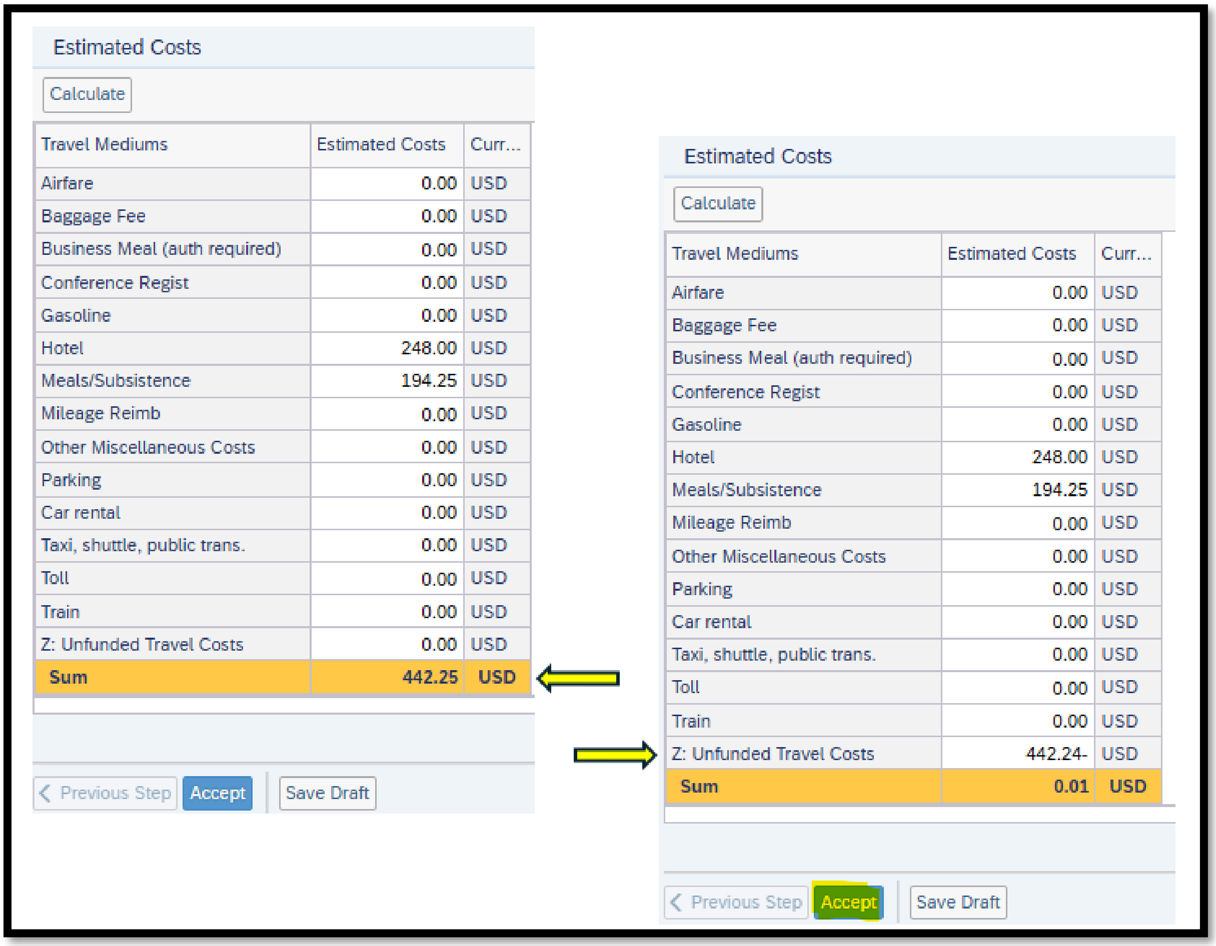
- Dates can be entered manually or by opening the calendar
- Time must be entered in military format
- Posting date will default to trip end date

Destination:

- Trip country – will default to US
- Trip region – enter manually or use search
  - To search:
    - Country/Group/Region field: This field is for the State you are traveling to. Capitalize both letters of the state abbreviation and include an asterisks. For example: PA* or NJ*
    - Name of Trip Country: This field is of the City you are traveling to. Enter as many or few letters as you wish, capitalizing the first letter only and use an asterisk. For example: Harris* for Harrisburg; Bloom* for Bloomsburg
- Destination – free text, enter location/name of training

Additional Information:

- Estimated costs, hotel and meals, will populate based on dates and location entered (these can be changed if necessary)
- Meals will need to be adjusted for meals provided at conference/training/meeting
  - ***Note:*** *if traveler is not claiming hotel and/or meals, these must be reduced to $.01*
- ***"Insurance Purpose Only"*** *traveler enters actual expenses on Travel Approval Request and then REDUCES the sum to $.01 by entering a negative amount under "Z:Unfunded Travel Cost". See example below:*



Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Curr...
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	248.00	USD
Meals/Subsistence	194.25	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	**442.25**	**USD**

Previous Step | Accept | Save Draft

Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Curr...
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
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Gasoline	0.00	USD
Hotel	248.00	USD
Meals/Subsistence	194.25	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	442.24-	USD
Sum	**0.01**	**USD**

Previous Step | Accept | Save Draft

- Click “Accept” to save and return to main screen;

- For Enterprise Rental instructions, see page 7 of “TM – Process for Prepaid Expenses”
- **Reminde**r: initial and date all receipts and attach to your expense report. Keep originals on file in your office.
- Approvers who are also cost center managers will have to approve their own travels. Watch for an automatic email
- Payment made to third party (excluding Enterprise):
  - Follow instructions and complete Direct Payment Request Form
  - Forward for approvals along with necessary documentation

Tips:

- Mileage only requests for recurring trips may be submitted on a monthly basis. Traveler may use the mileage log and submit the mileage as one total:
  - Use the last day of the month as your travel date (non-overnight travel)
  - Complete the mileage log and save it to a file
  - Use the total number of miles in your expense report
  - Upload your log as an attachment
- While traveling within the state of Pennsylvania, we are exempt from local and county lodging taxes. Documents are available for travelers to provide to hotels.
- When reserving an Enterprise rental, be sure to use the link on the Travel Management page. This will result in accurate billing to our corporate account
- Travel policy and forms may be found on this page:
  - https://www.commonwealthu.edu/offices-directory/financial-services/travel-management
- The Travel Management system will default to the cost center that the traveler’s salary is charged to. It is important for the traveler to know what cost center they should be using.