



TRAVEL INFORMATION - TRAVEL MANAGEMENT SYSTEM TIPS

Travel Guidelines

Prior to traveling, or entering anything into the Travel Management system, you should be familiar with the basics:

- PASSHE Travel Procedures

https://www.passhe.edu/policies/documents/BOG_Policies/Policy%201986-07-A.pdf

- Travel information and step-by-step instructions for all tasks in the Travel Management system may be found here:

<https://www.commonwealthu.edu/offices-directory/financial-services/travel-management>



KEY NOTES:

- All travelers should submit a request (Travel Approval Request or TAR) prior to the trip to include details of the travel, as well as any estimated costs.
 - All travel considerations should be the most economical method.
 - No optional upgrades;
 - No optional upgrades to seating assignments;
 - No concierge services;
 - No valet parking unless there is no other option
- It is acceptable to skip the travel request submission only when the following 3 criteria are met:
 1. It must be non-overnight travel
 2. It must be a regular part of your duties – for example:
 - Chair required to visit campuses weekly
 - Student-teacher supervision
 - Admissions
 3. The only expense is personally owned vehicle mileage



KEY NOTES:

- Rental cars must be arranged using Enterprise and our corporate account.
 - Use of a rental car is prohibited unless it is the most economical means of transportation available (e.g., less expensive than a taxi or airport shuttle).
 - The rental car must be used for official business purposes only.
 - The employee must pay for any incremental cost of personal use of the vehicle.
 - Do not opt for insurance as this is covered by our Enterprise contract.
- Family members are prohibited from riding in university vehicles or rentals provided by the university.
- When using a personal vehicle for travel, the traveler will be reimbursed the mileage of either the distance between their residence and the travel destination or their home campus and the travel destination, whichever is shorter.
- The university does not reimburse travel insurance.



KEY NOTES:

- If you incur expenses prior to the trip and are reimbursed for those expenses (i.e. conference registration, airplane tickets, hotel, etc.) and then cancel the trip, you are required to reimburse the university for those expenses.
- When staying in a hotel in the state of Pennsylvania, we are exempt from any County or Local taxes; however we do pay the 6% state occupancy tax. Please provide the hotel with the PA Exemption Certificate found on the Accounts Payable webpage under the Travel Forms section.
- Subsistence rates are calculated automatically based on time and date of departure and return, and the trip region code entered. The subsistence rate shall cover meals, tips, tax, and all other expenses for each 24-hour period spent in a continuous overnight travel status.
 - When using Uber or taxi and you opt to provide a tip, the tip amount is covered under your daily subsistence and will not be reimbursed as part of the receipt for that item.



KEY NOTES:

- When travel is completed, submit your Travel Expense Report (TER) within 60 days of last day of trip.
 - When a traveler submits TER over the 60 day mark of trip end date, this reimbursement needs processed through Payroll to comply with IRS Publication 463.
- If you have receipts that you need to be reimbursed for (hotel, fuel, etc.), please sign and date each receipt and then scan and attach these receipts to your TER.



Features of the Travel Management System

- Travel approval requests and expense reports can be entered anywhere through the Web via Employee Self Service (ESS) portal
- Travelers have visibility of where requests/expense reports are in the process
- Travel is encumbered upon approval of the travel request
- Travel Assistants will have visibility of travelers' trips; however, travelers must send TARs and TERs for approval
- Travel Expense Reports will not route for re-approval if the total is within \$25 of the approved Travel Approval Requests
- Subsistence rates are calculated automatically based on time and date of departure and return, and the trip region code entered
- Attach scanned receipts and/or required documentation (i.e. conference itinerary);
 - Be sure to sign and date each receipt prior to scanning
- Inclusion of provision for classes during absence in the comment section of travel approval request.

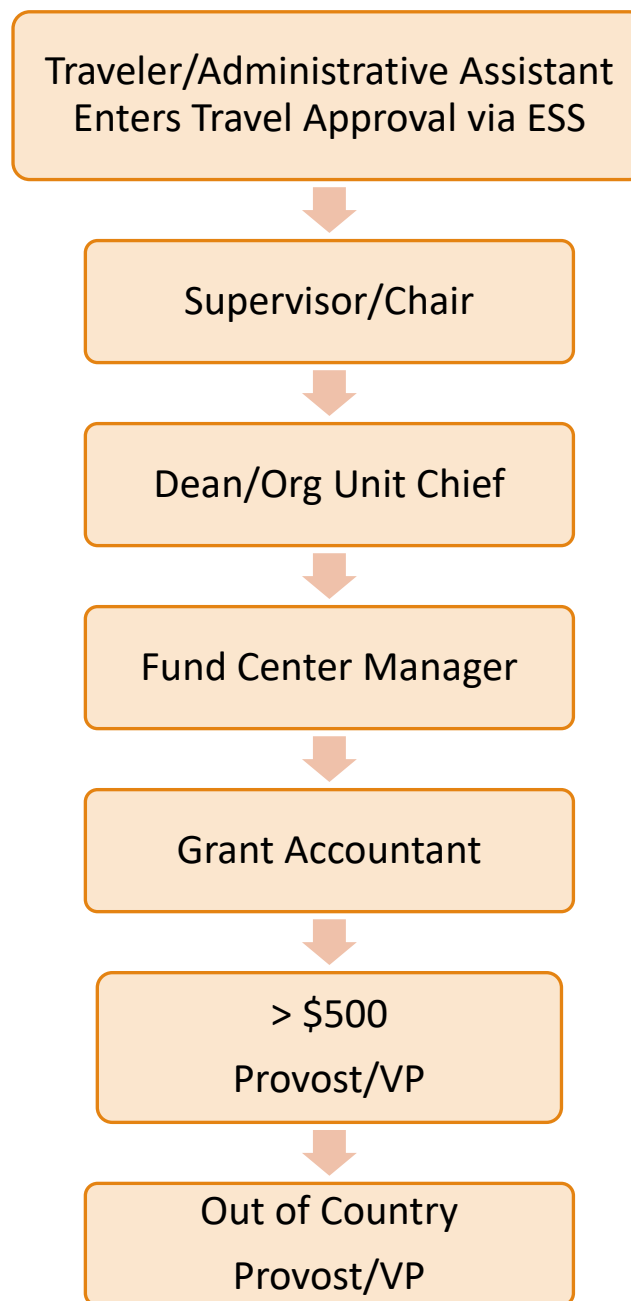


GENERAL TRAVEL NOTES:

- Travelers have the option of using their personally owned vehicle and requesting mileage reimbursement
 - For all travel other than between campuses, we ask that you use the trip optimizer and upload it as an attachment
 - When making travel plans, it is expected that the traveler will always keep the most economical method of travel in mind
- When reserving an Enterprise rental, be sure to use the link on the Travel Management page and enter your trip number. This will result in accurate billing to our account
- Meal receipts are not required. The system will calculate the allowable reimbursement.
 - Traveler must reduce their subsistence for any meals provided at a conference or breakfast that is provided by the hotel.



When travel requests are submitted, the form goes to the following people/positions for approval:



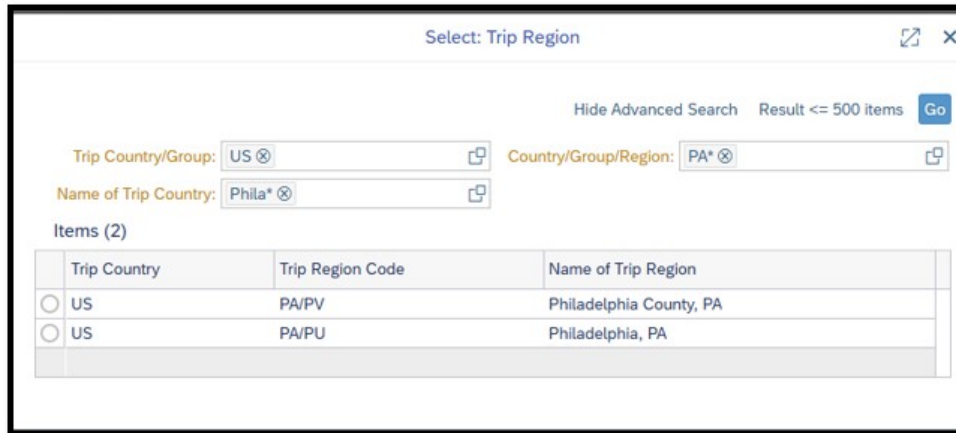
COMMON ISSUES:

- If approval log is not visible, traveler has not clicked “save and send for approval”
- When creating travel expense report and travel dates have passed, it will require you to delete the estimated costs
- If you had expenses prepaid (i.e. conference registration or airfare) and you have additional prepaid expenses to enter, adjust the Estimated Cost, do not delete
- When selecting third party vendors, make sure to scroll down the list to “X: pd to vendor” (car rentals, conference fees)
- Use the Create link to start your Expense Reports when you have an approved Travel Request in the system
- Remember when attaching receipts, to initial and date
- For admins to review first, set up rule to forward emails
- When an admin creates or modifies a travel document, the traveler is not automatically notified



COMMON ISSUES:

- To find the correct coding for your location in Travel Management, enter the two letter state abbreviation in caps with an asterisk after it (PA*) in the Country/Group/Region field; then in the Name of Trip Country field (which is your city), you can enter as many letters for the city name as you would like (capitalizing the first letter only) and then using an asterisk (i.e. Harris* for Harrisburg or Mans* for Mansfield) then click Go for the code to populate.
- Here is an example on searching for the city of Philadelphia:



The screenshot shows a web interface titled "Select: Trip Region". It includes a search bar with the following criteria: "Trip Country/Group: US", "Country/Group/Region: PA*", and "Name of Trip Country: Phila*". A "Go" button is visible. Below the search bar, it says "Items (2)" and displays a table with two results.

	Trip Country	Trip Region Code	Name of Trip Region
☐	US	PA/PV	Philadelphia County, PA
☐	US	PA/PU	Philadelphia, PA

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