Travel Using University Funds

Travel planning and payments are now online; there are no more paper documents to complete. The online process mimics the old paper-based process; you will still complete a travel authorization form and a reimbursement request form. Exception to policy forms are embedded in the other forms and can be completed as needed.

Before your trip

For travel, you have the option of charging your rental car, airport transportation, airline ticket or hotel directly to an IU account (see below), or you may elect to pay for these yourself and seek reimbursement after your trip is complete. In either case, you will need to complete a travel authorization form prior to the start of your trip – and prior to charging any costs directly to an IU account.

To begin your travel authorization, log into OneStart and select the Services tab. From the menu on the left-hand side of the page, choose Travel@IU.

- Choose Create a New Trip
  o Indicate whether the trip is in-state, out-of-state or abroad (if you are traveling abroad, choose Foreign in the State box)
  o Complete the form and choose Continue at the bottom of the page
  o If you have had previous trips to a similar location, you may get a listing of those trips at the bottom of the page; you may either select from those trips or continue on to create a new travel authorization
  o Name your trip on the following page, and provide the details on the structure of your trip (naming your trip is different than the purpose; the name will allow you to easily locate this trip from a larger list of trips)
    ▪ Note for Prepayments section: this is primarily for conference registrations and for lodging situations that require you to prepay for the first night
  o Choose Continue at the bottom of the page
  o In the Comments section, under “Trip”, add in details about funds you will be using in addition to your FRIT Research Account (such as money from a departmental or university travel grant, or money from another department)
  o Complete the remaining questions on this page, noting that required fields are marked by an asterisk*
    ▪ Please be specific, indicating the type of research being conducted and why you need to travel to do it
    ▪ Do not use acronyms in the purpose section; if you are attending a conference or meeting please provide the full name of the event
  o At the bottom of the page, add in the account number that you will be using for reimbursement and the limit that you would like to set
To charge a limo, flight or hotel directly to an IU account, you will need to have your Trip ID number. Once you have submitted your travel authorization form online, and after it has been approved by the Fiscal Officer and by Travel Management, you will be able to see this number in OneStart. Go to OneStart / Services / Travel@IU, and then click on View My Trips.

If you would like to charge your flight directly to an IU account

- By phone
  - After you have your Trip ID number, call one of the designated travel agencies:
    http://www.indiana.edu/~travel/traveling/desigtravelagen.shtml
  - Give the agent your Trip ID, account number(s) and any dollar limits for the charges
- Through the internet
  - In order to book your flight directly through the Orbitz for Business website, you must first register for an Orbitz for Business account
    - If you received a travel reimbursement during 2008, Travel Management has uploaded your account profile to Orbitz; you will need to set up a password to activate your account
    - Go to www.orbitzforbusiness.net, and click on Forgot or don’t have a password?, then follow the prompts to set up your account
    - Your Orbitz for Business member ID is your IU email address (johndoe@indiana.edu)
  - If you did not receive a travel reimbursement in 2008, you will need to contact Travel Management at travelbl@indiana.edu to request that they create a profile for you
• After they upload your email address to the Orbitz for Business website, you will receive notification and further instructions on how to register your account
  o Travel Management’s guidelines for making online airline reservations are here: http://www.indiana.edu/~travel/traveling/airlineonline.shtml; for further information, see also: http://www.indiana.edu/~travel/pdf/ofb_traveler_guide.pdf
  o After you select a flight and are ready to purchase it, you should be able to enter your Trip ID number
    ▪ Please be sure that the amount you are allowed to spend from your account (the account limit that you set in the authorization) is at least as much as the price of the ticket

If you would like to book a car to take you to the airport

If you would like to reserve a limousine for transportation to the Indianapolis airport and charge it to your research account, you can call Classic Touch Limousine at 339-7269 and provide them your trip ID and account number, along with the details of your flight departure and arrival times.

If you would like to reserve a rental car and charge it directly to an IU account

Option 1: Enterprise Car Rental

• Faculty can rent a vehicle through Enterprise for a trip which is 1) originating in Indiana and 2) for University business only, and may charge the rental directly to an IU account
  o For more information, please see: http://www.indiana.edu/~travel/traveling/travelingbycar.shtml#rental
  o Frequently asked questions about this process are answered here: http://www.indiana.edu/~travel/resources/faq.shtml#enterprise

• On the Travel Authorization form, you will be asked for your method of travel; if you will be using Enterprise or another car rental group, check the appropriate box
  o If you want to use Enterprise, once you complete the authorization form, you will be provided a link to make that reservation

• Once you complete the Travel Authorization and route it for approval, return to View My Trips in OneStart and view the trip that you are planning
  o At the very bottom of the page, it will say Routing for Approval, and will also have a link to the Enterprise Campus Rental system
  o Use this link to book the vehicle

• When you arrive at the Branch Office (you may use either location)
  ▪ 1907 South Walnut Street, 812-336-2114
  ▪ 1601 North College Avenue, 812-336-6635

  o You must have a valid driver’s license
  o You will need to provide the confirmation number
  o According to Travel Management: “IU travelers are covered by the University’s insurance while on business travel”
• Additional insurance is not needed, which means that it will not be eligible for reimbursement, except for travel taking place in Ireland, Mexico or Puerto Rico
• When you sign the contract (for business use), you should decline CDW and SLP; protection is already included under the IU contract as long as you have provided the correct account number and it is for business use only * *

• Please note that your account will be charged a mandatory car insurance fee for all car rentals paid through IU funds. IU provides this insurance through its Risk Management office. The rates as of March 2010 are:

<table>
<thead>
<tr>
<th>Rental Agency</th>
<th>Daily Insurance Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Rent-A-Car</td>
<td>$1.47 per day</td>
</tr>
<tr>
<td>National Car Rental</td>
<td>$2.69 per day</td>
</tr>
<tr>
<td>All other rental agencies</td>
<td>$4.65 per day</td>
</tr>
</tbody>
</table>

• Please note, if you are driving for a trip that will include both University business and personal time, you cannot charge the vehicle cost to an IU account
  o You may follow the same steps as you would for a rental originating outside of Indiana (detailed below) to arrange the vehicle and charge it to a personal account, and then seek reimbursement after the trip
  o If you do this, please be aware that the protection provided under the IU contract only covers the portion of the trip which is for University purposes
  o The remainder of the time will need to be covered in some other way, such as with your own auto insurance
• When you return the vehicle
  o Return the vehicle with the same level of gas as when you picked it up
  o Get a copy of your receipt; if you are unable to do so, you may go online to www.enterprise.com and, at the bottom of the page, click on Print A Receipt
  o Keep your receipt to include with your travel documentation at the conclusion of your trip

Option 2: University Motor Pool Rentals

IU also keeps a certain number of cars on campus to rent for university business. Please see http://www.indiana.edu/~travel/traveling/motorpool.shtml.

Rentals originating outside of Indiana or for personal use

• The web links to book car rentals that 1) originate outside of Indiana or 2) are for personal use are located at: http://www.indiana.edu/~travel/traveling/rentalcar.shtml
• For additional information on car rentals for personal use, see also: http://www.indiana.edu/~travel/resources/faq.shtml#E19
If you would like to charge your hotel directly to an IU account

- For hotel reservations for University business, you now have the option to make your reservation through Hotels.com and to charge your room and tax to an IU account
  - You can do this on the website at Hotels.com, using your account number and Trip ID number
  - For more information, and to get started, click here:
    - Click on **Hotel Online Reservations**, followed by **Hotels.com** and then click on the **Sign Up** button
    - From there, you will only need to enter your IU network username (the first part of your IU email address) and basic employee information
    - Then you can create a password and you will be all set
  - For more information on this program, you can contact Travel Management at [travelbl@indiana.edu](mailto:travelbl@indiana.edu), or call 812-855-2873
- Please note: Orbitz for Business allows you to locate and make hotel reservations, but this website does not allow you to charge the hotel directly to your IU account; this option is only available through Hotels.com

**While traveling**

- Keep receipts, including
  - Airline ticket (boarding passes are not sufficient); for e-tickets, documentation of ticket purchase from travel agent or website is sufficient
  - Receipts for luggage charges; these are separate from your airline ticket (unless you pre-paid, in which case you need to keep that receipt as well)
  - Conference registration receipt
  - Rental car receipt
  - Taxi receipt(s)
  - Lodging receipts
    - When lodging is shared, but one person pays the bill, each person can only be reimbursed for his or her own expenses; the person who paid the bill will have to seek reimbursement from the other travelers for the costs associated with their travel
- **Per Diem**
  - In order to receive a per diem, it is not necessary to keep receipts for food; this reimbursement will be calculated based on the M&IE figures from this website: [http://www.indiana.edu/~travel/traveling/perdiem.shtml#rates](http://www.indiana.edu/~travel/traveling/perdiem.shtml#rates)
  - No claims for per diem for an overnight trip can be paid without an original paid lodging bill
  - The amount of per diem a traveler receives depends on the destination, the travel dates and the amount of time in a day spent on business
After your trip

• When you go to OneStart / Services / Travel@IU, click on View My Trips
• Find the trip you just completed; under Options, you will be able to choose Request Reimbursement. Note that this option will only show up a couple of days after your trip end date.
• This will pull up all of the trip details from the Travel Authorization you completed beforehand
• If you traveled by personal car, you will need to provide mileage numbers to claim reimbursement
  o You can calculate mileage using [www.mapquest.com](http://www.mapquest.com) or [www.maps.google.com](http://www.maps.google.com).
• Just as with the paper form, you will need to provide details on the start and end times of your trip, whether personal time was involved and whether any meals were provided by the conference
  o If you answer that your trip included meals provided or personal time, after answering that set of questions click on the Refresh button
  o This will bring up a table that allows you to enter which meals were provided and the dates of the personal time
• If necessary, you can change the account limit you set for reimbursement; the fiscal officer will check this
• Enter your receipts
  o You will need to enter receipts by category (i.e.: lodging, parking, conference registration, etc.)
  o For receipts in foreign currency, please go to [http://www.oanda.com/currency/converter/](http://www.oanda.com/currency/converter/) in order to convert the foreign currency into dollars, selecting the specific day the receipt was generated. Print a copy of the conversion to accompany every foreign currency receipt.
  o For each category of costs, enter the total amount of the charges, and the number of receipts that you have to support those costs
    • If you have 4 receipts for a single type of charge (taxi receipts, for example), enter the total amount that you spent on these charges, and then enter 4 for the number of receipts
    • If you have a hotel receipt that also includes charges beyond room and tax, you will have to enter those separately, even though you only have one receipt
      • If, for example, your hotel receipt includes parking charges, enter the room and tax total for the hotel category, and indicate the number of receipts (likely 1)
      • For the parking category, enter the amount you spent on parking, and indicate 0 for the number of receipts (you do not have a separate receipt for parking)
      • Then, because you cannot say that 0 receipts are also original receipts, click on No for original receipts, and in the Exception to Policy box, explain that the parking charge was included on the original hotel receipt which you have already accounted for in the lodging category
    • If you have charges for which there are no pre-set categories, enter them under the Other category and provide detailed explanations
• These should be for travel-related charges only
• Other purchases, such as museum tickets and books, should be submitted for reimbursement separately from your travel forms
  ▪ If you do not have original receipts for any of the charges you list, you must complete the Exception to Policy form for that charge
  o When you initially click Save & Continue, the document will be checked for any inconsistencies and then will provide a summary of the requested reimbursements
    ▪ Initially, it will show reimbursement amount as $0.00, because the document is pending and has not yet been approved
    ▪ The same section will also detail the requested amounts by category and any exceptions you may have noted
  o If everything is correct, click Route for Approval at the bottom of the page
  o Submitting receipts to Travel Management
    ▪ After routing your document for approval, you will get a screen that asks you to print a coversheet to send with your receipts to Travel Management
    ▪ Click on Generate Coversheet
    ▪ Print the coversheet
    ▪ Organize and attach your receipts as described on the coversheet
    ▪ Give the coversheet and receipts to the faculty secretary; she will scan them for departmental records and send the originals to Travel Management

If you have not yet signed up for direct deposit of travel reimbursements through OneStart, you may do that through the Services tab on OneStart. While travelers not signed up for direct deposit will still receive a check from Travel Management, at some point in the future, Travel Management will require all travelers to sign up for direct deposit.

If you have questions regarding travel procedures or you would like assistance making reservations, please email the Faculty Secretary at fritdept@indiana.edu, or stop by Ballantine Hall 642. You may also visit the Travel Management website at http://www.indiana.edu/~travel.