Travel Training
Spring 2022
Agenda

• State Travel Regulations
• Travel Checklist Overview
• Creating a Spend Authorization
• Creating an Expense Report
• Top Reasons Requests are Reduced
• Top Reasons Requests are Delayed
• Controller’s Office: Travel Website
• Questions
State Travel Regulations

All state employees are expected to comply with the state mandated travel guide.

Full PPM49 Travel Guide and Pocket Guide can be found on the travel website.

Updates are sent through Faculty/Staff Notices and added to the travel website.

Travel Website: southeastern.edu/travel
Before Travel Checklist Breakdown

Before you Travel!

Create a Spend Authorization

Spend Authorization is Approved

Preferably two weeks before travel start date

Workday Tasks

1. Create Spend Authorization (for yourself)
2. Create Spend Authorization for Worker (for other faculty members)
3. Create Spend Authorization for Non-Worker (for candidate or student)

Business Process - any edits made to the SA starts the approval process over
Spend Authorization is an estimation of costs that may be incurred during travel.

What is the purpose of an SA?
To ensure the person traveling will be covered by the State Insurance and will be reimbursed for expenses within state travel regulations.

- Original forms are no longer required to be delivered to the travel desk. As long as the form is fully signed and approved by all required members, a legible, scanned and uploaded version to the Workday report is acceptable. The Ethics Disclosure form is the only original form still required in the travel office.

- Please ensure a driving expense item (car rental, mileage, etc.) is included on your spend authorization to verify you have taken the Safe Driving Course.
  - Add any passengers riding/travelling in the vehicle with you.
Book through Christopherson Business Travel
HTTPS://APP.CBTAT.COM

From New Orleans – reserve parking at
WWW.USPARK.NET

From Baton Rouge, bring your State ID and Airport Certificate for discount.
Before Travel Checklist

Breakdown - Flights

CONTRACTED TRAVEL AGENCY
EFFECTIVE JANUARY 1, 2021

CHRISTOPHERSON BUSINESS TRAVEL
WEBSITE: HTTPS://APP.CBTAT.COM/

ONLINE SUPPORT
TOLL FREE: 800-535-0179
EMAIL: ONLINESUPPORT@CBTRAVEL.COM
NON REFUNDABLE ON-LINE BOOKING TRANSACTION FEE:
$7 FOR DOMESTIC OR INTERNATIONAL TICKET

TRAVEL ADVISOR TEAM
TOLL FREE: 800-961-0720
EMAIL: STATELAUNIV@CBTRAVEL.COM
NON REFUNDABLE AGENT TRANSACTION FEES:
$24.00 PER DOMESTIC TICKET

Christopherson Business Travel
5588 S. Green Street
Salt Lake City, UT 84123
Before Travel Checklist
Breakdown - Driving

Are you Driving?

Less than 99 miles:
- Use personal vehicle and claim $0.58/mile
- Provide odometer and/or online map calculator (Google Maps, MapQuest, etc.)

More than 99 Miles:
- Car Rental thru Enterprise, Hertz, or National; State Acct Number: L142174
- Traveling out of state, attach airfare quote to show cost savings
- Gas receipts to be original and itemized
### Before Travel Checklist

**Breakdown: Hotels**

- **Check travel destination on state’s tier system.**

<table>
<thead>
<tr>
<th>Louisiana Travel: Hotel Tax Exemption Form</th>
<th>Out of State Travel: Hotel Overage Request Form (usually for conferences)</th>
<th>Other Travel: limited to routine lodging rate</th>
<th>Sharing a room? Allowable rate: state rate x people in room</th>
</tr>
</thead>
</table>

- **Sharing a room?**
  - Allowable rate: state rate x people in room
Before Travel Checklist
Breakdown: Misc.

**Miscellaneous Items**

- Registration Fees
- Membership Fees
- Travel/Cash Advances
- LA State Sales Tax
- PCARD or personal card with reimbursement
- Cannot reimburse through Travel
- When spending personal funds on airfare or registration unless travelling with students
- Travel Advance Agreement/Request
- Usually not reimbursed
- Tax Exemption Form
Keep all receipts!

Reminder: Please deliver any originals not received via email to the travel desk!

Most common originals needed: parking, baggage, and fuel receipts
After Travel Checklist Breakdown

- Complete Expense Report in Workday
- Itemize expense based on type
- Each traveler needs an expense report
- Upload conference agenda
- Submit original receipts and forms

- Preferably within 5 days of travel
- Travel Desk @ SLU 10720
- Accounts Payable Room A103
**Spend Authorization Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Southeastern Louisiana University</td>
</tr>
<tr>
<td>Start Date</td>
<td>10/02/2020</td>
</tr>
<tr>
<td>End Date</td>
<td>10/02/2020</td>
</tr>
<tr>
<td>Description</td>
<td>Trainers Conference</td>
</tr>
<tr>
<td>Business Purpose</td>
<td>Travel - Conference</td>
</tr>
</tbody>
</table>

**Spend Authorization Details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement Payment Type</td>
<td>Direct Deposit</td>
</tr>
<tr>
<td>Justification</td>
<td>Travel to UNO to attend a meeting with the Workday trainers.</td>
</tr>
</tbody>
</table>

**Create Spend Authorization - Task**

**Spend Authorization Lines**

**Attachments**
Only cities listed in PPM49 are available to choose, except Hammond. If your destination city is not listed, choose “Other” and list the city in the Memo box.
### Spend Authorization Line

<table>
<thead>
<tr>
<th>Expense Item</th>
<th>Conference Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Per Unit Amount</td>
<td>25.00</td>
</tr>
<tr>
<td>Total Amount</td>
<td>25.00</td>
</tr>
<tr>
<td>Memo</td>
<td></td>
</tr>
<tr>
<td>Cash Advance Requested</td>
<td></td>
</tr>
</tbody>
</table>

#### Worktags

- **Cost Center**: 22001 Human Resource Office
- **Fund**: FND019 Operating Fund
- **Function**: FNC008 Institutional Support

### Totals

- **Conference Registration**: 25.00
- **Mileage**: 56.43

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You have submitted Spend Authorization: AUTH-000092,
Spend Authorization

All forms have been approved

Attachments have been uploaded

Submitted to the Travel Office
Expense Report Information

Expense Report For: Employee: Jennifer Berthelot Rowell

Creation Options:
- Create New Expense Report
- Copy Previous Expense Report
- Create New Expense Report from Spend Authorization

Memo: Trainers Conference

Company: Southeastern Louisiana University

Expense Report Date: 09/29/2020

Business Purpose:

Cost Center: 22001 Human Resource Office

Fund: FN0019 Operating Fund (10)

Gift:

Grant:

Program:

Project:

Function: FN009 Institutional Support (60000)

Accounting Driver:

Additional Worktags:

Search:
- 10/02/2020 Trainers Conference: 81.43 USD
- 09/16/2020 Travel for Conference: 168.43 USD
Expense Line

Screen Shot 2020-10-02 at 10.52.00 AM.png

Successfully uploaded

Comment: Mileage Calculation

Expense Line

Date: 10/02/2020

Expense Item: Mileage

Quantity: 99

Per Unit Amount: 0.57

Total Amount: 56.43

Currency: USD

Memo

Control

*Cost Center: 22001 Human Resource Office

*Fund: 50010 Operating Fund

Instructions

Reimbursement may not exceed a maximum of 99 miles per round trip at .57 cents per mile. You must attach a copy of your mileage calculation (e.g. Google Maps)

Item Details

Origin: In State - Office, Louisiana, United States of America

Destination: New Orleans, Louisiana - Orleans, St. Bernard, Jefferson, Plaquemines Parishes, Louisiana, United States of America

Receipt Included: Yes

Submit  Save for Later  Close
All forms have been approved
Attachments have been uploaded
Submitted to the Travel Office
Top Reasons Travel Requests are *Reduced*

- Hotel Rates outside routine lodging approved rate
- Original receipts
- Louisiana State Sales Tax not removed
- State rate not requested when parking at N.O. Airport
- Alcohol not reimbursable
- Tips over 20%
- Traveling outside timeframe of allowable meals
Top Reasons Travel Requests are *Delayed*

- Expense Reports not submitted timely
  - Within 5 days of travel completion
- Approval forms submitted after travel
- Original receipts not submitted to Travel Office timely
- Proper documentation not uploaded
- Expense dates all outside approved dates of travel
All travel information, including policies, forms, updates, etc. are located at:

WWW.SOUTHEASTERN.EDU/TRAVEL
Travel Desk

Phone: 985-549-2089
Email: travel@southeastern.edu
Location: Accounts Payable Room A103
Mail: SLU 10720