

Faculty & Staff Travel Instructions & Guide

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Types of Travel

Vacation/Out of Office

- Personal time away from the office, travel not reimbursed by the university

Professional travel

- **Conferences/training:** travel to OU related and social work professional activities
- **Practicum:** travel to and from practicum sites
- **Tulsa-Norman:** faculty and staff travel between Tulsa-Norman





PROCEDURES





Procedures

Important Principles for Travel





1. All faculty and staff are responsible for timely completion and submission of forms both prior to and post travel. TRAVEL CAN NOT BE REIMBURSED IF NOT PREAPPROVED.
2. No registrations, hotels, flights should be booked or completed PRIOR to the submission of the required forms (generally speaking, this is roughly 2 months prior to travel).
3. Travel cannot be reimbursed unless both the pre and post forms are completed and they are completed within the required time frame.



Types and location of Required Forms

Form	Who/When to Complete	Form Submission & Approval	Location of form
Professional travel: national and international, conference, etc			
 <p>Travel and Vacation Pre-Authorization Form</p>	<p>Everyone, all faculty and staff must complete this form prior to traveling. You will not be reimbursed by the university if this form is not completed.</p>	<p>Concur system http://www.ou.edu/controller/fss/concurtravelnews.htm</p>	<p>Concur system</p>
 <p>CAS Travel Assistance Program (TAP)</p>	<p>If you wish to request funds from the CAS travel assistance program, you must fill out and submit this form. Everyone should do this, until they use all of the \$1600 available to them for travel. NOTE: TAP can only be used for up to 2/3 of the travel. The remaining 1/3 should come from other sources, i.e. Departmental funds, and approval for this funding must accompany the TAP form.</p>	<p>Norman, submit to Rachel Madden. In Tulsa, submit to Laura Kent. Director approves form, and then sends to CAS for processing.</p>	<p>Form located on the Faculty Resources webpage, also on the CAS website.</p>
  <p>Travel Reimbursement Claim</p>	<p>Everyone, immediately following travel.</p>	<p>Concur system</p>	<p>Concur system</p>

Types and location of Required Forms, continued

 <p>Presidential International Travel Fellowship</p>	<p>If your travel is international, you can apply to the presidential fellowship.</p>	<p>Director writes letter of support.. In Norman, submit to Rachel Madden. In Tulsa, submit to Laura Kent.</p>	<p>Memo is sent from provost annually, usually December. http://www.ou.edu/content/provost/memos.html</p>
 <p>Faculty Enrichment Grants</p>	<p>Through CAS, can use grants for travel.</p>	<p>Application process, deadlines set annually, must get letter from Director.</p>	<p>Form located on CAS website http://cas.ou.edu/funding-sources1</p>
<p>Other special travel</p>			
 <p>Norman-Tulsa trips</p>	<p>Through CAS and OU-Tulsa dean.</p>	<p>Director must approve, sends email to faculty/staff that authorizes the travel.</p>	<p>Faculty submits the travel reimbursement claim only.</p>
 <p>Practicum Travel</p>	<p>Any faculty or staff traveling for practicum purposes (site visits and other pre-approved practicum travel).</p>	<p>Travel Reimbursement Claim is completed by traveler. In Norman, submit to Rachel Madden. In Tulsa, submit to Laura Kent. Director signs and approves form and submits for processing.</p>	<p>Form located on the Faculty & Staff Resources webpage.*</p>



Vacation Travel

- All faculty and staff should request leave via email to the Director (Tulsa) or Assistant Director (Norman) prior to being out of the office.
- In Tulsa, the Director will cc: Laura Kent on the approval response email; in Norman, the Assistant Director will cc: Rachel Madden on the approval response email. Rachel & Laura will note time off on internal calendars





Professional Travel: Conferences



2 months PRIOR to travel (or sooner for events such as CSWE that give early bird opportunities)



Step 1: Complete the Travel Pre-Authorization via Concur



Step 2: If your travel will request TAP funds, complete TAP Form. Note: all faculty should request TAP funds until they use the \$1600 allotted to them. **NOTE: TAP can only be used for up to 2/3 of the travel. The remaining 1/3 should come from other sources, i.e. Departmental funds, grant funding, development funds, etc., and approval for this funding must accompany the TAP form**



Post travel (within 30 days of travel)



Step 3: Complete & submit Travel Claim Reimbursement Form, with all necessary attachments, via Concur

Professional Travel: Practicum

Any faculty or staff traveling for practicum purposes (site visits and other pre-approved practicum travel) should complete a **Travel Reimbursement Claim** within 90 days of the date of travel, via Concur.





Professional Travel: Tulsa-Norman



Any faculty or staff traveling between Norman & Tulsa must have *pre-approval* from the Director via Concur.



Traveler should complete a **Travel Reimbursement Claim** within 30 days of the date of travel.





RESOURCES AND HELPFUL INFORMATION



General Categories on Forms: Definition and Resources



Public Transportation: this is for items such as train (Amtrak); public transportation besides airfare.



Local Transportation: shuttle, taxi, etc., to aid in travel while at travel destination.



Other could include:

- Baggage
- Wi-fi



Parking at hotel (rare); Parking at airport

Parking estimates can be easily obtained at

<http://www.bestparking.com/>





Mileage: Be sure to include mileage to/from the airport from your home campus.




General Categories on Forms: Definition and Resources (Cont.)




Registration

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- Conference registrations are allowable on the traveler's Travel Card with the following criteria **in writing from the conference host**.
 - (A) Conference host will apply a significant discount for early registration to the conference (AND)
 - (B) Conference host will allow for substitution of participants without penalty (AND)
 - (C) Conference host will refund 100% of the registration cost if the conference is cancelled*



ANY AND ALL receipts for payment using the traveler's Travel Card **must be accompanied by the preceding information IN WRITING FROM THE CONFERENCE HOST**. There will be no exceptions, and this information should be gathered by the conference attendee.



If the conference you wish to attend does not meet any of the criteria above (established by the State of Oklahoma), you will need to pay your registration out of pocket and seek reimbursement via your travel claim for that trip. You will need to keep a receipt (showing that YOU paid for it) and a copy of the conference brochure in order to receive reimbursement.



General Categories on Forms: Definition and Resources (Cont.)





Per Diem

- Per diem amounts are automatically calculated within Concur. Should you need to obtain per diem rates outside of the Concur system, you can locate them at:
<http://www.gsa.gov/portal/content/104877>
- Verify that you are viewing the correct fiscal year. These are based on the federal fiscal year that runs October 1-September 30. The FY is named for the year it ends in. Example: December 19, 2016 is part of the 2017 FY.



Lodging

- Lodging should be done at the conference hotel to ensure compliance with travel policies. Lodging expenses can be paid utilizing the traveler's Travel Card. The traveler must submit a receipt (showing zero balance) and a copy of the conference brochure via Concur.
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Professional Travel & Vacation

(For faculty and staff reporting)

- 1) Personal (Send request to the Director prior to approval)
- 2) Business (Send request to the Director prior to approval)

3) Traveler: _____ Unit: _____

4) Destination: _____

5) Expected departure date & time: _____

6) Expected return date & time: _____

7) Purpose of trip: _____

8) Who will handle your responsibilities in your absence _____

9) How can you be reached during this time, including U.S. phone number _____

10) To be completed only for out-of-state travel while on duty

I plan to pay for my trip using:

- Faculty Development
- TAP funds
- Social Work
- Other: Define department here

If you are requesting TAP; don't complete the "estimated" portion below.

Estimated Travel Expenses:

These are only estimated expenses.

Sign the form prior to submitting to the Fiscal & Office Managerial Associate.

Airfare
Public Transportation
Per Diem
Lodging
Registration
Mileage
Local Transportation
Parking
Other

TAP Form

You would **NOT** need to fill out a TAP form if

- You have already used your \$1600 for the year
- You have the trip fully funded through another source

Note on the TAP form, you must also include

- A brief one-two page narrative stating the purpose and benefits of the travel to the applicant
- A copy of the invitation to present/perform from the conference or event/venue



TAP Form

The form can be found on this page:

- <http://cas.ou.edu/travel-assistance-program-tap>

This page has multiple forms related to this program. The traveler should complete the “CAS Travel Assistance Program (TAP) Form”.

- **NOTE: TAP can only be used for up to 2/3 of the travel. The remaining 1/3 should come from other sources, i.e. Departmental funds, and approval for this funding must accompany the TAP form.**



Travel Reimbursement Form

Travel reimbursement claims should be completed and submitted via Concur

Note:

- Travel for site visits should be received in Financial Services prior to 120 from the date of the first visit. Therefore, they should be submitted to Laura (Tulsa) or Rachel (Norman) no more than 90 days after the first date of travel. Requests made for travel more than 120 days ago will be taxed and will require additional paperwork to be completed by the traveler.
 - Note: traveler risks reimbursement for items if a conference brochure can not be obtained. Delaying travel claim submission can multiply this possible risk.
- All other travel – within one month of travel date
- Paperwork for travel during May and June should be submitted immediately following the trip

