Travel Job Aid

Use this job aid to create a unique Travel Number (T#) for overnight or monthly blanket T#.

- Daily mileage requires a T# and will no longer be entered in eRequest.
  - Blanket T# to cover an estimated amount for the calendar or fiscal year.
- Single Day/Non-Overnight Registrations
  - Enter an eRequest for registration fee for personal reimbursement or PCard transaction.
  - Does not go on the blanket T#.
- Approval will be done electronically.

For Help: Contact
Jesse Buxton, buxton.26@osu.edu
Patty Corfman, corfman.4@osu.edu
Sarah Mays, mays.201@osu.edu
Vickie Snyder, snyder.252@osu.edu

Travel System Entry Process

1. Log into the eTravel system https://etravel.osu.edu
2. Under the Travel Request tab, click
3. Enter your employee ID number in the Employee ID field.
   a. Note: your information will populate in the appropriate fields.
   b. For monthly travel only, click to show a checkmark.
4. Complete the Business Purpose of the Trip section.
   Why you are traveling and how it affects the function of the department.
5. In the Travel Locations section, fill in the Departure and Return Dates using the first and last date of travel or blanket term.
6. In the Departure City field, type in the city you are departing from.
   a. Default city can be the city of your headquarters or various.
7. In the Destination Cities field, type name of the city/state or type “various” as the city and choose Ohio as the state for monthly mileage.
8. Estimated Cost Detail, click
   a. Record estimated expenses for mileage or all estimated costs for the trip:

   ![Estimated Cost Detail Table]

9. Travel Chartfield Details section, click
   a. 63401 – Employee in state
   b. 63405 – Employee out of state

10. Click Save for later  Save and Continue
11. Add all attachments necessary for overnight travel.
   a. Examples: agenda, flight itinerary, pre-approval, Driving vs. Flying Worksheet, Vacation vs. Business Worksheet, etc.

12. Review the summary for accuracy and click Submit for Approval.

13. You will receive an email from the eTravel system issuing your T number.

Reimbursement Process

- One blanket T# is needed for monthly mileage reimbursements per fiscal year or calendar year depending on which budget year applies to you.
- A separate T# is needed for each overnight trip.

Steps to Submit for Reimbursement:

1. Complete your monthly mileage log or overnight Travel Reimbursement Form.
   a. In-State Transportation Log for Calendar Year
   b. Travel Reimbursement Form

2. Log into the eTravel system https://etravel.osu.edu
   a. Search for the existing T#.

3. Attach document containing the monthly mileage log or complete documentation packet for overnight travel.
   a. Label the attachment accordingly: EX: “July 2018 Log” or “Travel Reimbursement Packet.”
      
   b. The comment field can be used to note special processing instructions.
   c. Click Submit Changes.

4. Send an email notification to the Service Center at FAES-Travel@osu.edu and CC yourself with the notation “ready for processing (name of month)” After your T# has been approved.
   a. If you do not send an email notification, your reimbursement may be delayed.
Helpful Tips

- Add a comment (and SAVE!) when making any changes to a Travel Request or when trip information has changed after a request was submitted.
  - If your total actual expenses do not exceed 20% of your estimated expenses, you do not need to adjust the amount of your travel request.
- For ease of auditing the travel, the documentation should be scanned in as one PDF document in the order that it appears on the Reimbursement Form.
- Never hit CANCEL or CLOSE in eTravel. This will cancel the request not cancel the current entry.

In-State Reimbursements:
- If your reimbursement is consistently split between common chartfields, you may split the estimates on the travel request.
  - If chartfield splits are infrequent or unknown at the time of the request, enter the request for a single default chartfield.
  - Split chartfields can be added during the reimbursement process even if they were not part of the travel request.

Common Problems

- When submitting a travel request and a red error message appears on the top of the screen: Click on the error message. This will take you to the corresponding part of the page that has an error. Correct the error and click Submit for Approval. You can also check the Travel ASSIST pages for more detail.

- The request has been denied. A travel request is denied when changes need to be made before the request can be approved. The approver adds comments then denies the request. You will receive an email from BO-eTravel@busfin.osu.edu stating the travel request has been denied, asking you to fix the errors and resubmit.
  - Click on the link in the email to go back to your request (you may need to sign into the system first).
  - Scroll down to the comments section. The approver will have a comment listed for why it was denied.
  - Fix the errors and submit for approval.
  - The request is back on the approvers work list for review and approval.
  - Provided that all of the errors have been corrected, the request will be approved.

Inquiry Help
To go back and retrieve the request, log into the eTravel system then click search. On the travel request search page, enter your T# and click search. This should return you to the travel request. If the search does not return any results, search by traveler name by entering your last name in that cell. If you are sorting additionally with your first name, do not enter a space after your last name and the comma. Don’t forget to clear out the T# you entered in the search before you click search. This should return a list of travel requests entered by your name. Click view travel request to review it.
New Policy Changes

AIRFARE:
- Airfare must be purchased through CTP (Corporate Travel Planners), no exceptions!
  - CTP MUST be used to book airfare for non-OSU speakers/guests.
  - https://busfin.osu.edu/buy-schedule-travel/travel/contact-travel-agent
- PCards or personal credit cards cannot be used to purchase airfare through any other company.
  - Use the GHOST CARD, UNIV/OSUMC* (...1329) when booking airfare/rental car/hotel with CTP.
  - University prepayment is the preferred payment method, but personal credit cards are accepted by CTP for the personal expenses of a trip. (Ex: Vacation in conjunction with a business trip.)
  - Vacation in conjunction with business travel: use only agent-assisted service not online Concur. CTP will split final payment. Complete the “CFAES Vacation vs. Business Worksheet” and attach in eTravel.
  - All airfare itineraries, including those from CTP, are required to be attached in eTravel.
  - IF PCARD IS SAVED UNDER YOUR PROFILE, IT MUST BE REMOVED!
  - Car rentals must be from the university’s contracted rental agency: Enterprise/National.
  - All travel-related expenses must be linked to the existing T#. (hotel bills, registration, shuttle services, parking, etc.)