

## **Travel Quick Guide for Travelers**

This guide is for travelers. If you are a delegate, please refer to the Travel Quick Guide for Delegates. If you would like to setup a delegate, see the Add a Delegate instructions.

### **Pre-Approval – Before travel**

A pre-approval must be created and approved prior to making any travel arrangements. Prior to creating a pre-approval, the traveler should discuss the travel with their supervisor.

For step-by-step instructions on creating a pre-approval, please see the Travel section of the Chrome River manual.

Note that a pre-approval does not need to include exact amounts. A pre-approval is simply an estimate of how much a trip will cost. The expense categories are there to help you appropriately estimate the full cost of the travel event.

Once a pre-approval has been created it will be routed to the BCM over the Index entered for approval. Once approved, it will be exported to Banner. Banner exports are processed the day after they have been approved. The traveler will receive an email with their T number once it has been imported into Banner.

After the travel pre-approval has been approved, if air travel needs to be booked, contact Lisa Bradshaw. She will work with you to book your air travel. Utilizing Lisa to book your travel will result in a much lower Travel Agent Fee. Alternatively, you can contact our approved travel agency and pay the full agency fee to book travel.

### **Expense Report – After travel**

Note that all purchasing card transactions related to your travel must be in your eWallet before you complete your Expense Report.

- If you have made transactions using your p-card and they are not listed in your eWallet, you must wait until the transactions are uploaded into your eWallet to complete your Travel Expense Report.
- If any travel expenses made using a purchasing card of a person who is not the traveler, e.g., an admin's p-card, contact Lisa Bradshaw to request the transaction be moved to your eWallet.
- Airfare charges will be moved into your eWallet by Lisa Bradshaw. If you do not see them, please contact Lisa Bradshaw.

For step-by-step instructions for completing a Travel Expense Report, see the Travel section of the Chrome River Manual.

DO NOT include travel expenses on your monthly Purchasing Card Expense Report.