Before your trip

- An eTravel request must be submitted and approved prior to your trip taking place or any travel related purchases being made. You will know that your trip has been approved when you are assigned a T#, which should be sent via email once your request is approved. Typically your request will be approved within 24-48 hours. It is recommended that you plan as far in advance as possible to allow enough time for approval and to obtain lower prices on airfare.
- It's recommended in ERA to contact your travel admin at least 3 weeks before your trip, with the following information:
  - Dates of travel
  - Destination
  - Detailed business purpose for trip
  - Chartfield information; Org, fund and project (if applicable) numbers
    - PI or advisor approval is needed if you are a student
  - Cost estimates for prepaid and reimbursable expenses
  - Requests for any pre-payments
  - Any additional information (i.e. splitting costs with another traveler, taking personal time, etc.).

- **Airfare:** All OSU employees must book their flights through the University travel agency, CTP. Flights can be booked online using the online booking tool concur or by calling a CTP agent. Non OSU employees are exempt from the CTP mandate, but are encouraged to use CTP.
  - You must specify the T# when booking and if you are traveling on UNIV or OSP funds
  - If you are pre-paying for your flight online, you will need to choose the correct OSU “ghost card”. This is based on the funding of your travel request (UNIV or OSURF). If you would rather pay personally and get reimbursed, you can load your personal credit card into your concur profile and choose that card for payment
  - As soon as you receive your confirmed/ticketed flight receipt, send this to your travel admin and upload the attachment to eTravel if you have access to do so.
  - For non-domestic travel on OSP grants, only US Flag carriers can be used. Reference list is here.
  - If you are having difficulty locating a specific flight, please reach out to your travel admin for assistance
  - If adding any personal time to a business trip or if flight needs changed, see pages 3 and 4

- **Rental Car:** Rental cars should be reserved using concur or the Business rental solutions page to ensure the approved contracted vendors are used (National, Enterprise or Hertz) and that the correct insurance is included. Note that this is not a prepayment, only a reservation, so payment will still be required when you pick up the car. An airfare cost comparison will be required to show that renting a car is the less expensive option if you are traveling 5 or more hours.

- **Mileage:** As of 1/1/19, the mileage rate is $0.58 per mile. Some OSP grants may have lower mileage rates. You are responsible for communicating this to your travel admin. An airfare cost comparison will be required to show that mileage is the less expensive option if you are traveling 5 or more hours.

- **Registration:** Conference registrations can be prepaid or reimbursed. Options for prepayment are specified below:
  - UNIV Funding: Payment can be processed with the unit p-card.
  - OSURF/OSP Funding: Multiple levels of approval are required and payment is processed by check. It's recommended in ERC to contact your travel admin at least 4 weeks before any registration deadlines to ensure your payment can arrive on time. For a less time consuming registration process, reimbursement is recommended.

- **Lodging:** It is recommended that lodging be booked/paid for by you and then the expense is reimbursed following the trip. Please contact your travel admin if other options need to be discussed.
  - Lodging is to be booked under 1.5 times the GSA lodging rates for the location of the hotel or at the conference hotel using any discounted rates available. Contact your travel admin if you have questions about what is within policy.

- **Per Diem:** Per diem is determined by the GSA rates for the city you are visiting. Any meals provided by a conference, hotel, or on a flight will be removed from your reimbursement. You are only eligible for up to 75% per diem on days when traveling to/from your destination.
While traveling

- Keep all your itemized receipts that show proof of payment. This includes airfare, hotel, rental cars, gasoline, taxis, parking and any other business travel related receipts.
  - If meals will be covered by per diem, you do not need to save your actual meal receipts
  - If you are splitting any costs with another traveler, make sure to have documentation that shows how much you personally paid so your reimbursement is accurate.
  - If you lose a receipt, most vendors can provide an itemized receipt copy if you contact them directly.
- If you have any problems with flights while traveling, please contact CTP for assistance
  - M-F 8am-7pm: 855-784-9282
  - After hours, weekends and holidays: 1-833-200-0261

Following your trip

- Turn in a post trip form and all receipts (including anything that was pre-paid) to your travel admin as soon as possible, within 90 days of your return. Provide a business purpose/explanation for any unexpected situations or expenses.
- Your travel admin will organize and submit your receipts to the College of Engineering Business Operations Center (BOC) for processing. Receipts will be reviewed to ensure that expenses were compliant with OSU travel and expenditures policies.
- Reimbursement processing time is typically 3-6 weeks. You will be notified to review and approve the reimbursement by email. If you have questions on your reimbursement amount, please contact your travel admin for clarification.

Reminders/Resources:

- Not complying with the OSU policies will result in a policy exception. Exceptions need additional approval and are tracked within your area. Multiple exceptions may result in expenses not being reimbursed.
  - Some exceptions include: Travel without a T#, not booking airfare with CTP or concur, reimbursements after 90 days, and lack of itemized receipts.
- You can place a flight on hold for 24 hours without purchasing, if you are waiting on obtaining a T#. Additional instructions on how to do so are available upon request.
- If you are a student, your travel request approval email may be sent to your OSU email instead of buckeyemail. Please check both accounts and reach out to your travel admin if you have not received an email within 24-48 hours.
- OSU General Travel Page: https://busfin.osu.edu/buy-schedule-travel/travel
- OSU Travel Policy: https://busfin.osu.edu/policies-forms?combine=&department%5B%5D=258
- BOC website: https://boc.engineering.osu.edu/
Personal time added onto business travel

OSU can only be charged for expenses related to business travel as allowable by policy. Any additional expenses caused by adding travel time must be covered by the traveler themselves and are not eligible for reimbursement from OSU.

You as the traveler are responsible for pulling an airfare cost comparison in concur to see if business only travel is more or less expensive. The least expensive airfare option does not include basic economy (yellow warning triangle). The lowest regular economy fare (green check mark) that would meet the business needs if only traveling for business should be chosen. The lowest fare may not be with your preferred airline, but should be used as a comparison if it would work with your business travel schedule.

Due to fluctuating flight prices and the lag that can occur between eTravel approval and airfare booking, additional cost comparisons must be pulled by the traveler within 7 days of booking their flights with CTP or concur.

Best practice is to pull the comparison the same day you are actually booking your flights. All documentation must be saved and sent to your travel admin.

If the trip with personal travel is less expensive than business only travel, then flights can be booked. Save all documentation that shows this and send to your travel admin.

If the trip with personal time is more expensive than business only travel, save all documentation and see below for payment options:

- **Reimbursement:** You can pay for the entire cost of the flight using a personal credit card and get the business comparison rate reimbursed following the trip. You can set up a personal credit card in your concur profile to pay online or call a CTP agent to book the flights. This way is recommended if your travel is particularly complex.
  - Instructions on how to complete your concur profile and add a credit card can be found here (Titled: “Completing your concur profile”).

- **Split payment:** Certain airline carriers (Delta, United and American) may allow split payments, so the University is only charged for expenses related to business travel and your credit card is charged for expenses related to adding additional travel time. You must call a CTP agent to have payments split, this cannot be done online. You are responsible for referencing your cost comparison and communicating to the CTP agent how much should be charged to your credit card and how much should be charged to OSU.

- **Repayment to OSU:** You can call CTP or use concur to prepay your flights and then write a personal check to Ohio State to repay the difference between the actual cost of travel and the business cost comparison within 7 business days of booking the flights. Any amount of difference in price must be paid back. Checks are made out to “The Ohio State University” and are given to your fiscal contact, who will submit the check for deposit.

Review the full travel policy here. You can sign up for travel trainings here.

Updated 12/31/19
Cancelling or changing travel plans

You will need to call a CTP agent in order to change or cancel flights.

- **Changing flights**: You are able to change flights during your trip if needed, however you may be required to pay a change fee and/or the difference between the original flight cost and the new flight. In order for these costs to be reimbursed by OSU, you must have a detailed business purpose for the change (i.e. business schedule change, weather issues). Costs for changing flights for personal reasons will not be reimbursed.
  - You must turn in both your original and updated flight receipts along with your business purpose when submitting your travel reimbursement.
- **Canceling flights**: Flights can be canceled and sometimes the cost of the airfare can be credited to your concur profile as an unused ticket. Unused tickets can be applied to a future trips and will typically expire within one year. You must have a detailed business purpose for the cancellation
  - Southwest is a 100% exchange value
  - United, Delta and American will usually credit the price of the flight minus a $200 change fee
  - If you have frequent flyer status with an airline, this may reduce fees. Communicate your status to the CTP agent
  - Your flight fare class can make a difference in the amount refunded or change fee. For example, basic economy flights have no value after cancellation on all carriers.
Travel FAQ

1. When do I need an airfare cost comparison?
   - When you are adding any personal time onto business travel
     - For example, a conference is being held January 5-8\textsuperscript{th} in San Diego. You want to stay in San Diego until January 12\textsuperscript{th} to visit family. Your business only cost comparison would be the cost of a regular economy flight leaving January 4\textsuperscript{th} and returning January 9\textsuperscript{th}. You have one day on each end of the conference dates for domestic travel, per the travel policy.
     - If the trip from January 4-9\textsuperscript{th} was $350 and your desired flight from January 4-12\textsuperscript{th} was $300, you can have your flight prepaid through OSU since your flight with personal time is less expensive than the comparison.
     - If the trip from January 4-9\textsuperscript{th} was $350 and your desired flight from January 4-12\textsuperscript{th} was $450, then you should pay for the flight on a personal credit card or have the payment split if possible since you are choosing the more expensive flight. If you pay the full amount on a personal card, you will be reimbursed the comparison rate ($350) following the trip.
   - When you are departing from an airport other than Columbus (CMH)
     - A cost comparison would show a comparable roundtrip flight to/from CMH.
   - When you are driving a personal vehicle or renting a car instead of flying and traveling for 5 or more hours
     - A cost comparison would show a comparable roundtrip flight to/from CMH.

2. Should I book basic economy?
   - While basic economy (shown with a yellow warning sign in concur) is the least expensive option, it is not recommended due to the extensive restrictions included with this airfare class. You can still book it, but tell your travel admin you have researched, understand and accept these restrictions.

3. I found a better priced flight directly through an airline website, can I book it?
   - No, do not book flights directly through an airline website. Instead, complete the [Airfare Price Match Request form](#). Requests are reviewed within 24 business hours by CTP. In most circumstances, they will be able to find a similar priced flight through concur. If not, CTP and the OSU travel office will reach out to you with instructions on how to proceed. More information on this process can be found [here](#).

4. Do I have to book lodging using CTP or concur?
   - No, it is not required to use CTP/concur to reserve lodging.

5. Can I request per diem reimbursement if I am traveling within Ohio?
   - Only if you are staying overnight can per diem reimbursement be requested for this type of travel.

6. Why was a meal removed from my reimbursement?
   - If a meal was provided by a conference, international flight or if free breakfast was included with your hotel, it will be removed. This is because those costs are already built into your conference registration, airfare and lodging bills and these expenses have either been prepaid or you will be reimbursed for them already. This is both a federal government and an OSU policy.

7. Can I use the refueling service at a rental car agency?
   - If you need to fill up the gas tank of a rental car, a gas station should be used. Refueling at a rental car site comes with additional fees and the expense is usually ineligible for reimbursement, as there are less expensive options available.

8. Who should I contact if I have questions about my reimbursement?
   - Contact your area travel admin first. They can look into your question and connect with the service center for clarification if needed.

Review the full travel policy [here](#). You can sign up for travel trainings [here](#).

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