# TRAVEL PROCEDURES



### Content

**Travel Team** 

Docusign Form

**Travel Process** 

Encumbrance

**Estimated Expenses** 

- Hotel
- Airfare
- Rental/Personal vehicle
- Registration fee
- Group Meals

Travel with Students

**CBA** holders

FAQ's

# TRAVEL OFFICE

### MEET OUR TRAVEL TEAM

### travel@gram.edu

Annes Newton

Travel Specialist

Travel Office

Office Phone: 318-274-2576

Email: newtona@gram.edu

Carline Valmond

Assistant to the Controller

Controller's Office

Office Phone: 318-274-6091

Email: valmondl@gram.edu

# **GOOD-BYE CONCUR**





**Docusigns** 

Under Finance > Under Travel Office



#### Grambling State University TRAVEL AUTHORIZATION FORM

NO REGISTRATION OR RESERVATIONS SHOULD BE MADE UNTIL ALL APPROVALS ARE OBTAINED

		Encumbrance number:	
		G-	
Return Da	te	Desti	nation City
		\$	
			0.00
655			0.00
@			0.00
(6)			0.00
1	\$ 0.00	•	
	\$ 0.00		0.00
2			5.55
ai \$	\$ 0.00		
on):		\$	
			\$ 0.00
Amount: \$	1	Pay to G-	
	G-number		
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### **SUMMARY OF TRAVEL PROCESS**

• Ensure that you are an Authorized Driver (if not, contact mcmahonj@gmail.com)



• Encumber Travel Funds



• Submit Travel Request via Docusign with all supporting information 10 days prior to travel



• Ensure all travel items are paid for-3 days prior to travel



• Submit Expense Report



• Get Reimbursed



PPM49

### **SUMMARY CONTINUED:**

**Encumber Funds** 

View Document

 Encumbrance Header
 Title
 Trans. Date
 Estab. Date
 Total

 E0033946
 TR-Chatman07052023
 Jul 01, 2023 Jul 01,

| Encumbrance Accounting | Sea# COA | X | C/U | Index|Fund | Organ | Acct | Prog | Act | Acct | Acct

RELEASE: 8.7.0.5

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Travel Request Docusign



### Expense Excel and Expense Docusign

	Grambling State Uni	versity
	Travel Expense Form Travel expense report must be submitted within "5" busi	mess days of the traveler's return.
raveler's Name:	<u>G:</u>	E:
rip Start Date:	Trip End D	ate:
und-Org-Account:		_
urpose of <u>Travel:</u>		
otal Reimbursable <u>Cos</u>	t:	_
ertification of Payee: I	certify that this expense account is jus	t and true in all respects; that the
listance shown were ac	tually and necessarily traveled on the	dates specified on official business only,
hat the expenses chara	advises incomed on official business	f the State and none of the expenses
an the expenses ones	ea were incurred on official outliess o	
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# HOW TO DO AN ENCUMBRANCE

Go into banner9

Encumbrance Number

Type in FGAENCB

Click GO

Encumbrance- enter last name, first initial, date of trip e.g Valmond, C 10/1/23

Document total-insert the amount needed

Select encumbrance

Click on Related in the top right corner

Enoumbranco Hambon			
▼ ENCUMBRANCE HEAD	ER		
Encumbrance		Transaction Date *	06/26/2023
Description			
Document Total *			
Encumbrance Type	● Encumbrance		
Vendor ID	···	Date Established *	
Encumbrance		Document Reference	
Change			
Title			
	Distribution		Document Text Exists
	✓ Open Status		Deferred Editing
	✓ NSF Checking		

Next page

### **CONTINUED...**

Click on **Document** text

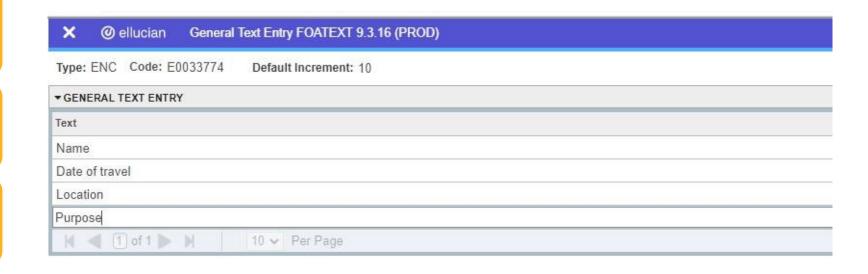
Enter name of traveler and related information as follows

**Save** then X out of tab, press down arrow at bottom of page

Journal type E010

Insert necessary information

Click **Complete** to submit Encumbrance request



For step-by-step instructions, contact the travel office.

# COMPLETED ENCUMBRANCE

View Document

#### Encumbrance Header

Encumbrance		Title		Trans	Date	Esta	b. Date	Total
E00:	1			Apr 14,	2023	Apr 1	4, 2023	500.00
Doc Change Num								
Status	Complete	TypeE	Doc Ref					
Document Text:								

**Encumbrance Accounting** 

Seq#	COA	FY	C/U	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFOvr	Status	Amount	Net Encum Total
1	R	23	U		100			40				N	Р	500.00	
Total o	of dis	play	yed s	equenc	es:									500.00	

**RELEASE: 8.7.0.5** 

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### **Attach to Docusign**

- Encumbrance total
- Encumbrance approval history

### **AIRFARE**

### **Christopherson Business Travel (CBT)**

\*\*\* Once the Travel Office has approved your travel request, you will receive an email stating you may proceed with booking your flight.

To book a flight you must first create a profile (24hrs before use): create profile

Log into Airportal Log in

Go to Book Travel. Book/Manage Online Trips

For the method of payment please select the CBA card that is already on file ending In \*III.

Attach the list of flight options to your travel request.

### AIRFARE CONTINUED...

#### TO BOOK FOR AN EMPLOYEE

- Go to Profile
- Under Acting as other user enter the user's name that you are performing duties for

or select the name from the drop-down list.

Then select Start Session

#### TO BOOK FOR A STUDENT

 Book for guest should be to the right of Trip Search, if it is not, then you will have to contact Christopherson at trips@cbtravel.com/800-600-3737

Business Travel to add it to your profile

Once you select book for guest, then insert the student's information and proceed with booking the flight

If you are unsure that you have completed purchase-verify with travel office

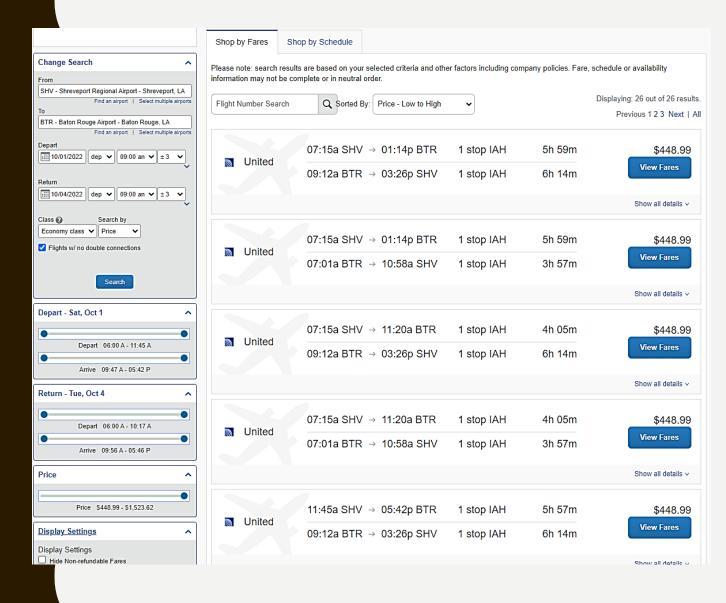
### HOTEL

✓ Attach the hotel credit card authorization form OR

✓ Have Hotel email credit card authorization link to travel email with name
and confirmation number

✓ For **in-state** hotels, you must provide the hotel with the hotel state tax exemption form: <u>Tax Exemption Form</u>

✓ Verify that Hotel has corporate number 2 days prior (**Esp Marriot**)



- The airfare quotes should look like this.
- Select Shop by Fares to show the amount.

### **MEALS**

#### This expense consists of 4 options

- I. Breakfast
- 2. Lunch
- 3. Dinner
- 4. Group Meals (cash advance for non-card holder)

If paid out of pocket for students or received a cash advance for meals, then list of students and g-numbers is required.

Refer to Per diem to determine the meal allowance (search by state and fiscal year).

- o In travel Request form, insert number of days **excluding** first and last day.
- There is a separate box for First and Last day ME&I total (i.e  $2 \times 51.75 = 103.5$ ), put in \$103.50
- o If traveling with a group of students, do not enter meals, enter cash advance total only

### CAR RENTAL

- Attach car rental booking form to the travel request: <a href="Enterprise">Enterprise</a> form
- A justification letter with supervisor's approval is required for larger vehicles
- Car rentals will be reserved and paid by CBA holders.
- Out of State Travels will get reimbursed for gas. (receipts are required).
- For in state car rental, once your travel request is approved, the Travel Office will email you to collect your gas card from Becky Fields (ext. 4460- located at property and receiving) (carry a copy with you).

#### ENTERPRISE RENTAL BOOKING FORM

Please allow 7 to 10 days in advance for Enterprise Rental booking to be guaranteed.

Please attach this form with the approved travel.

<b>Traveler:</b> (Must be an authorized driver – for more information, please contact Quintina Harris at ext. 3174)	Name:  G Number:  Department:  E Number:  Approved Travel Must Be Attached
Contact Information	Cell Number:  Work Email:  Work Number:
Number of Passengers (only passengers): All passengers (employee or non-employee) must be listed on this form. An acknowledgement form (formerly Hold Harmless Agreement) must be completed by the non-employee and attached to this form.  Type of vehicle if more than 4 passengers: (example Large SUV, Mini-Van or 15 passenger van)	Other passengers
Departure: (Only Enterprise business hours) Return: 318-254-0094 Enterprise rental Destination for pick up (In- State of LA only)	Date: Time:  Date: Time:  Ruston Monroe  Other

### CAR RENTAL CONT...

- If traveling with non-GSU employees, the travel office MUST be notified, and a <u>liability form</u> MUST be submitted
- Personal vehicles are allowed with proof that no rental vehicles were available and **prior** authorization from supervisor is given. Otherwise, traveler will only be reimbursed for a maximum of **99 miles**.

### MILEAGE EXPENSE TYPE

\* Distance traveled to airport is reimbursable- attach map-quest to show distance traveled

\*State-owned vehicle or state rented vehicle should be used prior to a personal vehicle when mileage exceeds 99 miles

\*If a rental car is not available, proof of unavailability **and prior** authorization from one's supervisor is required in order to be reimbursed for more than 99 miles.

\*Justification should be provided if a traveler is requesting to use his/her personal vehicle mileage.

\* Driving directions are required to be attached in ordered to be reimbursed.

### OTHER ALLOWABLE EXPENSES

#### This expense consists of 6 options

- I. Baggage
- 2. Gas cost to airport (SHV/MLU)
- 3. Internet
- 4. Parking
- 5. Ground Transportation- Uber, Lyft
- 6. Tips

### REGISTRATION/FEES

Attach the website link and your login information

Please specify which course you are registering for if there are more than one option.

If a check is needed to pay for the registration fee, then attach the W-9 form.

# INTERNATIONAL TRAVEL REQUESTS

- Permission letter to leave the US from President Gallot
- Booking out of Christopherson Business Travels/ Airportal requires letter of Approval from the State Office (case by case basis)- Send letter to Travel Office.

### **Department CBA Holders**

Insert CBA holder information

#### **Melody Ford**

#### **Academics-**

- Academic Affairs-Erica M.
- Kinesiology-Sheila Griffin
- Business-Amanda Sapp
- Honors College-Jackie Newsome
- Professional Studies-Laketha R.
- Enrollment Mgt-Catina Bowman

**Janice Cowan** 

**Band-Choir** 

**Carline Valmond** 

Administration

**Sharon Perkins** 

**Student Affairs** 

**Courtnei Davis** 

#### **Athletics**

- George Stubbs
- Kyle Jones
- D'Maria Matthews
- Erica cosby
- Jazmyne Lewis

**Kelsea Smith** 

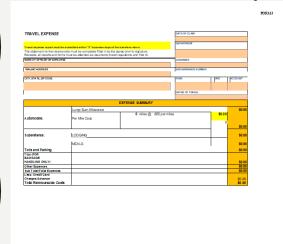
**President's Office** 

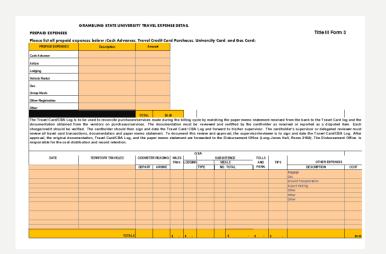
### BEFORE YOU RETURN ©

• Ensure that ALL receipts are to be uploaded including receipt from Hotel

### CREATING AN EXPENSE REPORT

I. Retrieve Expense Excel document: Travel Office Forms







### Page I

Page 2

- 2. Fill areas highlighted in peach
- 3. Values from page 2 will automatically populate into page 1
- 4. Complete Travel Expense Docusign
- 5. Attach Approved Travel Request
- 6. Attach Excel Document
- 7. Attach ALL receipts

	Grambling St	ate University
	Travel Expen Travel expense report must be submitted within	ise Form "S" business days of the traveler's return.
Traveler's Name:	<u>G:</u> _	E:
Trip Start Date:	Trip F	End Date:
Fund-Org-Account:		
Purpose of <u>Travel:</u>		
Total Reimbursable <u>Co</u>	st:	
Sertification of Payee: .	I certify that this expense account	is just and true in all respects; that the
distance shown were a	ctually and necessarily traveled o	m the dates specified on official business only
that the expenses charg	zed were incurred on official busi	ness of the State and none of the expenses
have been paid by the l certify that the charge for which the charges o	State; and that the full amount is j s set forth on this expense account are made were necessary and proj	
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Docusign page

### REIMBURSEMENTS

I. Ensure that your direct deposit account has been set up: Direct Deposit

### FYI'S

- One encumbrance and travel request per traveler (students will be placed on the staff's/faculty's travel request)
- Every traveler MUST have active Driver Authorization Status to be able to travel on behalf of GSU
- Reimbursements for personal meals do not require receipts but must be in accordance with PPM49
- Hotels booked above <u>PPM49</u> rate must at least be at the conference rate, anything higher requires authorization
- An Encumbrance adjustment form must be done if traveler went 20% above initial encumbered amount
- If traveling under Title III funds, prior approval is needed from Title III for any adjustment

### FYI'S EXPENSE EXCEL

- You can insert other necessary information/ expense descriptions under Other Expenses
- Under meals, you put breakfast, lunch, dinner and First day &/Last day. Next to that you will put the number of days and cost
- Do not submit invoice, only receipts
- One travel request per staff/faculty
- One trip per travel expense