

# School of Communication Travel Instructions: Preapproval, booking, and reimbursement

## Table of Contents

Travel preapproval .....	1
Combining business and personal travel .....	3
Booking travel .....	3
Air travel .....	3
Car Rental .....	3
Requesting travel reimbursement .....	4
Screenshots of a sample request .....	4
Top section .....	4
Spend Authorization Lines .....	5

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## *Travel preapproval*

To request permission to travel, faculty, staff, and grad students must submit a Spend Authorization (SA) through Workday. The SA must be approved prior to departure and before making any travel-related purchases. Travel is reviewed centrally, so approval times can vary widely. To be safe, we recommend that you allow at least 3 weeks to get approval for any travel.

For additional details, please see [OSU Travel Policy](#) and the Workday [Spend Authorization Job Aid](#). If you are traveling abroad, be prepared to fill out the [OSU's International Acknowledgement of Understanding](#) and review the university's policy regarding collaborations, including travel, to China, which is available on the Comm Research Carmen page.

What follows is a brief overview of how to submit an SA. Items marked with an **asterisk\*** require that additional documentation be attached to the SA. Required documentation is described in the Attachments section.

1. Log into WorkDay (<https://workday.osu.edu/>)
2. Type **Create Spend Authorization** in the search bar, hit enter, and click on the link that appears
3. Under **Spend Authorization Information** complete all fields (even fields that are not identified as required)
4. Under **Spend Authorization Details\*** in the box labeled "Justification" describe and justify the travel (what, when, where, and why).
5. Under **Spend Authorization Lines**, click the "⊕ Add" icon to enter each travel expense for which you are requesting reimbursement. If you are combining personal and business travel, see the section about this, below. Common expenses include:
  - a. **Airfare:** An estimated cost is fine. Please use the field labeled "Arrival date" to indicate the date on which you will return from your trip.

- b. **Baggage Fees:** These must be entered separately from airfare.
  - c. **Rental Vehicle\*:** An estimated cost is fine.
  - d. Mileage (Federal Rate)\*
  - e. **Lodging\*:** An estimated cost is fine. The university will only reimburse a standard/single room rate for one guest. You may arrive one day prior and depart one day after the business activity.
  - f. **Conference Registration:** You must identify a “supplier” (e.g., International Communication Association).
  - g. **Dues and Memberships:** You may also request approval to renew your membership to the professional association at the same time that you register for a conference.
  - h. **Ground Transportation:** In the Memo field enter the mode of transportation (e.g.: Uber, Lyft, taxi, bus, subway, train) and in the Item Details - Business Reason field describe the trip’s purpose (e.g., home to airport, hotel to airport). You may combine all trips into one item.
  - i. **Parking:** In the Item Details field describe the type of parking (e.g., airport parking, hotel parking).
  - j. **Per Diem (Pre-Trip):** Enter the Destination and Number of Days at the bottom of this section and the dollar amount will be filled in automatically. Treat travel days as half a day.
6. Under **Attachments** upload the following (accessed using the button to the right of the Spend Authorization Lines)
- a. **Travel justification:** If attending a conference, you must provide (i) documentation of paper acceptance or presentation details, and (ii) documentation showing dates/location of conference (e.g., a screenshot of the conference website). Please also describe any additional travel plans (e.g., adding personal travel, flying in/out different cities, etc.)
  - b. **Rental vehicle:** If you rent a vehicle instead of flying, you must attach a comparison flight and [ASC cost comparison](#) form. You will only be reimbursed for the less expensive option.
  - c. **Mileage:** If you plan to drive your own car, please attach a Google Map documenting the distance (starting at Derby Hall) and attach both comparison flight and car rental quotes along with an [ASC cost comparison form](#). You will only be reimbursed for the least expensive option.
  - d. **Lodging:** If you are attending a conference and are unable to book using the conference hotel rate, you must include a justification (i.e., the hotel is sold out).
7. Save you work
- a. If you need to stop before you are done, click “Save for Later” and record the 10-digit SA number.
  - b. If you are done, click “Submit” and make a record of the 10-digit SA number.

Once your SA is approved, you may proceed with booking your travel (see “Booking travel”). If you have not received travel preapproval by at least 3 days before your expected travel date, please contact Sam and Gwyn.

If you need to revise your SA (after step (7) above):

1. Log into WorkDay (<https://workday.osu.edu/>)

2. Type **My Spend Authorization** in the search bar, hit enter, and click on the link that appears
3. Find your SA number in the list displayed and move the mouse to the magnifying glass icon (). An orange box containing three dots will appear. Click on this, and a pop-up menu will appear. Use the menu to select Spend Authorization > Change.

### ***Combining business and personal travel***

If you plan to combine business and personal travel or if you intend to fly in/out of different cities (other than home city/conference city), you **must** note this in the original SA, including which dates are business travel and which are personal travel.

Once the SA is approved and you prepare to book your travel, you must also generate a cost comparison itinerary. The comparison is between the cost of the trip if it did not include personal travel to the cost of the trip including personal travel. To be eligible for reimbursement, the flight cost comparison must be generated using CTP **at the same time** that the flight is booked through CTP.

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### ***Booking travel***

Expenses should only be incurred once Spend Authorization approval is received.

### ***Air travel***

All faculty and staff business travel airfare must be procured through the university's contracted travel agency Anthony Travel. Graduate students are **not** required to book through Anthony Travel.

Go to the travel reservation website via the [Office of Business & Finance Travel page](#) and click the button labeled **Book Travel Online**. Use the **Trip Search** tool to find your preferred flight itinerary, view rates, etc. You can also use this function to gather flight cost comparisons when applicable (see below).

You should also confirm that Sam and Lilly can access your account. Under **Profile/Profile Settings, click on Setup Travel Assistants** to add both [sheth.27@osu.edu](mailto:sheth.27@osu.edu) and [triplett-boyd.1@osu.edu](mailto:triplett-boyd.1@osu.edu) as travel assistants and check "Can book travel for me." Faculty or staff should check that Sam Sheth "Is my primary assistant for travel." Graduate students should check that Lilly Triplet-Boyd "Is my primary assistant for travel."

Please contact Sam or Kayla with any questions or concerns.

### ***Car Rental***

Go to [OSU Discount Car Rentals \(https://busfin.osu.edu/buy-sell-travel/travel/rental-car-discounts\)](https://busfin.osu.edu/buy-sell-travel/travel/rental-car-discounts), log in with your OSU credentials, and scroll down to Make a Business Reservation. Select the links for Enterprise, National or Hertz to view rates or place a reservation.

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## Requesting travel reimbursement

All reimbursement documentation must be submitted **within 60 days**. The traveler is no longer eligible for reimbursement beyond the 60-day limit.

1. Use [this template](#) to prepare an expense report summarizing all expenses for which you are seeking reimbursement.
2. Collect **original itemized receipts showing proof of payment** for all expenses identified in (1). Electronic receipts are accepted. Receipts are not required for meals (per diem) or mileage.
  - a. If you combined personal and business travel, you will need to provide a receipt for the purchased flight, a quote for the comparable flights (created at the time of purchase), and [ASC cost comparison form](#)
3. Email the report and the receipts to the appropriate administrative staff. Faculty should send the materials to Sam Sheth (.27); grad students should send it to Lilly Triplett-Boyd (.1)

The school's administrative staff will submit the reimbursement requests through Workday on faculty/staffs' behalf.

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## Screenshots of a sample request

### Top section

The screenshot displays a Workday Spend Authorization form. It is divided into two main sections: 'Spend Authorization Information' and 'Spend Authorization Details'. The 'Spend Authorization Information' section includes fields for Company (The Ohio State University), Start Date (11/16/2022), End Date (11/20/2022), Description (Travel for NCA conference), Business Purpose (Conference), and Currency (USD). The 'Spend Authorization Details' section includes Reimbursement Payment Type (Direct Deposit) and Justification (I will be traveling from Columbus, OH to New Orleans, LA in November to participate in the annual conference of).

Spend Authorization Information		Spend Authorization Details	
Company *	The Ohio State University	Reimbursement Payment Type *	Direct Deposit
Start Date *	11/16/2022	Justification	I will be traveling from Columbus, OH to New Orleans, LA in November to participate in the annual conference of
End Date *	11/20/2022		
Description *	Travel for NCA conference		
Business Purpose	Conference		
Currency	USD		

# Spend Authorization Lines

Spend Authorization Lines    Attachments    Process History

+ Add

Viewing: [Grid Icon] [List Icon]

Click here to sort	
Airfare	<b>Spend Authorization Line</b>
Airline Baggage Fees	Expense Item * <input type="text" value="x Airfare ..."/>
Conference Registration	Quantity * 1
Dues and Memberships	Per Unit Amount * <input type="text" value=""/>
Ground Transportation	Total Amount * <input type="text" value=""/>
Lodging	Budget Date * <input type="text" value="09/13/2022"/>
Lodging Fees and Taxes	Memo <input type="text" value=""/>
Per Diem (Pre-Trip)	Cash Advance Requested <input type="checkbox"/>
	<b>Worktags</b>
	*Cost Center <input type="text" value="x CC12404 Arts and Sciences   School of Communication"/>
	*Balancing Unit <input type="text" value="x BL1461 Arts and Sciences   Social and Behavioral Sciences"/>

## Attachments

Spend Authorization Lines   **Attachments**   Process History

### Attachments



NCA22 Membership & Registration fee.png  
Uploaded by [User]

3 days ago

Comment



NCA22 Hotel rates.png  
Uploaded by [User]

3 days ago

Comment



NCA\_Conference\_Info.PNG  
Uploaded by [User]

2 days ago

Comment



NCA22 Acceptance.pdf  
Uploaded by [User]

2 days ago

Comment