



Travel Estimation/Expense Form Operations Support Services

Overview & Training



Travel Estimation/Expense Form

Business Ops Finance

Travel Estimation/Expense Form

- **Who:** Traveler or their support staff
- **What:** Estimation of trip expense (pre-travel) or actual expenses (post-travel)
- **When:** At time trip is known or upon return
- **Where:** Form is in the Business Ops portal
- **How:** Log in to Business Ops portal, select Finance, and select Travel Estimation/Expense Form



Travel Estimation/Expense Form

Business Operations

- Guided Smart Form:
 - Traveler
 - Dates & Status
 - Destination & Purpose
 - Funding
 - Transportation
 - Lodging
 - Miscellaneous Charges
 - Summary



Travel Estimation/Expense Form

Business Operations

Traveler Information

UNIVERSITY OF LOUISVILLE Business Operations Portal

Travel & Expense

Requests Admin

Traveler | Dates & Status | Destination & Purpose | Funding | Transportation | Lodging | Miscellaneous Charges | Summary

[See A. General Policy pg 1, B. Administration of Policy pg 2, Definitions - Workstation pg 4](#)

Are you entering travel for yourself?
 Yes
 No

This section autopopulates from travel profile based on empl id of traveler. →

| | |
|------------------------|------------------------|
| First Name: | Melissa |
| Last Name: | Shuter |
| Department Name: | Business Operations |
| Department Number: | 1531000001 |
| E-mail Address: | mshut01@louisville.edu |
| Supervisor First Name: | Lee |
| Supervisor Last Name: | Smith |

Comments:
Production test - delete after success

Cancel
Next



Travel Estimation/Expense Form

Business Operations

Dates & Status

Dates & Status Destination & Purpose Funding Transportation Lodging Miscellaneous

Travel Dates:
11/01/2019 - 11/05/2019 ✕ 📅

Any personal travel dates?
 Yes
 No

Traveler status:
 Employee
 Student
 Community Leader
 Other

Traveler type:
 Student travel
 Employee travel
 Other

Navigation can be done by using the buttons on the bottom or by clicking along the top menu

Cancel Save
Back Next



Travel Estimation/Expense Form

Business Operations

Destination & Purpose

Destination & Purpose | Funding | Transportation | Lodging | Miscellaneous Charges | Summary | [Submit Request](#)

Destination:

Description of trip:

Destination type(s):
 Domestic
 International

Duration of trip:
 One day
 Overnight
[See F. Meals and Other Expenses pg 8 #1](#)

Policy links throughout form (with red arrow pointing to the link above)

Business Purpose

Conference Meeting Recruiting Research Other

Registration Fee: Prepaid Reimbursed

Amount: Speedtype:

On all prepaid items select the method of payment from drop-down (with red arrow pointing to the dropdown menu)

Method of payment:

Central Billing Card
University Procard
Hotel WEX Virtual Card
Travel Card
Purchase Order
Other

Attach supporting documentation including receipts for post-travel (with red arrow pointing to the file upload button)

Please attach conference agenda and other trip documentation:
 N..

Comments: **Comment fields available on each tab** (with red arrow pointing to the text input)



Travel Estimation/Expense Form

Business Operations

Funding

Funding

Outside Third Party Covering Expenses
Non-Sponsored Program only?

Yes
 No

Is speedtype a Sponsored Program?

Yes
 No

Is the Sponsored Program funded by the Federal government either directly or via flow through?

Yes
 No

Will travel costs be split between two or more Sponsored Program funding sources?

Yes
 No

Max travel allowance?

Yes
 No

Cash Advance?

Yes
 No

[See K. International Travel pg 20 #4](#)

If travel will be paid by a Sponsored Program additional questions will be asked



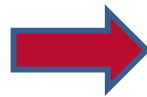
Travel Estimation/Expense Form

Business Operations

Funding – Sponsored Programs

Is speedtype a Sponsored Program?

- Yes
- No



Is the Sponsored Program funded by the Federal government either directly or via flow through?

- Yes
- No

How will the travel benefit the Sponsored Program?

For Sponsored Programs only, attach documentation that justifies that the travel is necessary to the Sponsored Program (e.g. meeting agendas, abstracts, copies of posters/presentations, etc...) If documentation not yet available indicate that in the comment box and please note: this documentation will be required prior to posting of travel expenses to the Sponsored Program(s):

N..



Travel Estimation/Expense Form

Business Operations

Transportation

Transportation

See policy E. Transportation and Lodging (T&L) pg 5 #1

- Rental car
See policy T&L pg 6 #4
- Private car
See policy T&L pg 5 #2
- Airfare
See policy T&L pg 6 #3
- Train
- Other
See policy T&L pg 6 #5

- Prepaid
- Reimbursed

Amount:

Speedtype:

Method of payment:

Default speedtype on travel profile auto-populates. This can be changed as needed



Comments:



Travel Estimation/Expense Form

Business Operations

Lodging

Lodging

Hotel name:

[See policy T&L pg 6 #6](#)

Hyatt

Comment:

- Prepaid
- Reimbursed

Is lodging at preferred conference hotel?

- Yes
- No

This menu only displays if No is selected for non-conference hotel

Why is a non-conference hotel being used?

- Conference hotel was full
- Less expensive alternative
- Personal preference
- Other



Travel Estimation/Expense Form

Business Operations

Miscellaneous Charges

Miscellaneous Charges

- Meals
See F. Meals and Other (M&O) Expenses pg 8
- Ground transportation
See E. Transportation and Lodging pg 6 #4
- Baggage
See policy M&O pg 9 #3
- Parking
See policy M&O pg 9 #3
- Tips
See policy G. Entertainment pg 10 Tipping
- Tolls
See policy M&O pg 9 #3
- International travel insurance
- Other
See policy M&O pg 9 #2, #3, #4, #5 G. Entertainment entire section except Tipping

Comments:

Recommend \$75/day estimate for per diem



Travel Estimation/Expense Form

Business Operations

Summary

Travel & Expense

Requests Admin

- Traveler
- Dates & Status
- Destination & Purpose
- Funding
- Transportation
- Lodging
- Miscellaneous Charges
- Summary**

Traveler: Melissa Shuter
Dates: 9/12/2017 - 9/16/2017
Destination: TEST _ Orlando, FL
Description of trip: Test entry - conference (attached file)

General overview informatoin

Details to build the travel authorization

| Tab | | Speedtype | Prepaid Amount | Reimbursable Amount |
|-------------------------|-----------------------|-----------|----------------|---------------------|
| Destination and Purpose | Registration fee | 02062 | 2,000.00 | |
| Transportation | Airfare | 02062 | 500.00 | |
| Lodging | Hyatt | 02062 | | 1,000.00 |
| Misc. | Meals | | | 500.00 |
| Misc. | Ground transportation | | | 100.00 |
| Misc. | Baggage | | | 50.00 |
| Misc. | Tips | | | 25.00 |
| Misc. | Other testing | 02062 | | 20.00 |
| Total | | | 2,500.00 | 1,695.00 |

Additional information including maximum travel allowance

| | Total |
|-----------------------------|----------|
| Cash advance amount | |
| Max travel allowance amount | |
| Third party amount | 1,000.00 |

Cancel

Back

Reimbursable amount



Travel Estimation/Expense Form

Business Operations

Transportation

Lodging

Miscellaneous Charges

Summary

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| Destination and Purpose | Registration fee | 02062 | 2,000.00 | |
| Transportation | Airfare | 02062 | 500.00 | |
| Lodging | Hyatt | 02062 | | 1,000.00 |
| Misc. | Meals | | | 500.00 |
| Misc. | Ground transportation | | | 100.00 |
| Misc. | Baggage | | | 50.00 |
| Misc. | Tips | | | 25.00 |
| Misc. | Other testing | 02062 | | 20.00 |
| Total | | | 2,500.00 | 1,695.00 |

Grand Total

\$4,195.00

| | Total |
|-----------------------------|----------|
| Cash advance amount | |
| Max travel allowance amount | |
| Third party amount | 1,000.00 |



Travel Estimation/Expense Form

Business Operations

Travel Estimations (pre-travel)

- Business Operations enters in PeopleSoft Financials and submits on the traveler's behalf
- Supervisor and Budget Approvals required
- Department has full authority to update and change if needed

Approve Travel Authorization
Travel Authorization Summary
Lisa London [User Defaults](#)

General Information

Description SSHE Authorization ID 000002349
Business Purpose Conference
Status Submitted for Approval Updated on 04/10/2018 3:40:13PM By ALSTAR01
Date From 04/23/2018 To 04/27/2018 Attachments (1) Notes

Accounting Defaults More Options Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Details

| Expense Type | Date | PC Business Unit | Project | Activity | Amount | Currency | Attachments | Approve |
|--------------------------------|------------|------------------|---------|----------|--------|----------|-------------|---------|
| Out of State Airfare | 04/23/2018 | | | | | | | |
| Out of State Hotel | 04/23/2018 | | | | | | | |
| Out of State Travel Meals/PerD | 04/23/2018 | | | | | | | |
| Out of State Miscellaneous Exp | 04/23/2018 | | | | | | | |
| Out of State Miscellaneous Exp | 04/23/2018 | | | | | | | |
| Out of State Miscellaneous Exp | 04/23/2018 | | | | | | | |

Totals

| | | |
|-------------------|----------|-----|
| Total | 1,493.98 | USD |
| Less Non-Approved | 449.98 | USD |
| Total Authorized | 1,044.00 | USD |

Pending Actions

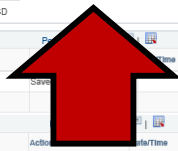
| Role | Name | Action | Time |
|-----------------|----------------------|--------|------|
| HR Supervisor | Shuter, Melissa Long | Save | |
| Expense Manager | (Pooled) | | |

Action History

| Role | Name | Action | Time |
|----------|-------------------|-----------|----------------------|
| Employee | Starrett, Anna L. | Submitted | 04/10/2018 3:40:13PM |

Comments

Budget Checking completed. Report is ready for Approval/Posting.
Budget Status Valid
Budget Options
Approve Send Back Hold Deny Save Changes



Budget Checking completed. Report is ready for Approval/Posting.
Budget Status Valid
Budget Options
Approve Send Back Hold Deny Save Changes

Budget Checking completed. Report is ready for Approval/Posting.
Budget Status Valid
Budget Options
Approve Send Back Hold Deny Save Changes



Travel Estimation/Expense Form

Business Operations

Expense Reports (post-travel)

- Business Operations builds expense report in PeopleSoft
- **Traveler submits PeopleSoft expense report – only action traveler must take in this process**
- Supervisor and Budget approvals required
- Department has full authority to update and change if needed

NavBar > Navigator > Travel and Expenses > Approve Transactions > Approve Transactions

| Select | Transaction Type | Total Amt | Name | Employee ID | Description | Transaction ID | Date Submitted | Status | Role |
|--------------------------|----------------------|------------|----------------|-------------|-----------------------|----------------|----------------|------------------------|---------------|
| <input type="checkbox"/> | Cash Advance | 950.00 USD | Traveler, John | T00001 | Advance NY 08/01/2017 | 0000000594 | 07/11/2017 | Submitted for Approval | HR Supervisor |
| <input type="checkbox"/> | Expense Report | 853.00 USD | Traveler, John | T00001 | AMA Conference | 0000012512 | 09/02/2017 | Submitted for Approval | HR Supervisor |
| <input type="checkbox"/> | Travel Authorization | 770.00 USD | Traveler, John | T00001 | NY 08/02/2017 | 0000000000 | 08/02/2017 | Submitted for Approval | HR Supervisor |

Select All Clear All

Return to Approval List
Employee Expense History



Travel Estimation/Expense Form

Business Operations

Pre-trip Communication

- Who: Traveler
- When: On the Wednesday before a trip
- How: By email
- What:
 - Link to the central Controller's travel office and policies
 - How to submit receipts, including a link to Business Operations receipt form
 - Reminder to have important phone numbers when traveling
 - How to submit per-diem
 - Next steps to process the expense report when the traveler returns



Travel Estimation/Expense Form

Business Operations

Post-trip Communication

- Who: Traveler
- When: On the Wednesday after trip
- How: By email
- What:
 - Link to the central Controller's travel office and policies
 - How to submit receipts, including a link to Business Operations receipt form
 - How to submit per-diem information
 - Steps to process the expense report when the traveler returns



Travel Estimation/Expense Form

Business Operations

Post-trip Communication – Per Diem

- Spreadsheet is sent with the pre- and post-trip communication
- Email completed sheet to businessops@louisville.edu

| | A | B | C | D | E |
|----|--|------------------|--------------|---------------|--------------|
| 1 | Per Diem | | | | |
| 2 | Indicate meals that per diems should be paid for with an X under the meal | | | | |
| 3 | Dates of Travel | Breakfast | Lunch | Dinner | Notes |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | See flight arrival and depart times for per-diems below: | | | | |
| 12 | Depart Prior To: | 6:30am | 11:00am | 5:00pm | |
| 13 | Return After: | 9:00am | 2:00pm | 9:00pm | |
| 14 | | | | | |



Travel Estimation/Expense Form

Business Operations

Travel Receipts

Travel Receipt web form



Email to Business Operations



Provide paper receipts to Business Operations



Expense Report



Reimbursement



Travel Estimation/Expense Form

Business Operations

Weekly Follow-up Communications

- Reports are analyzed weekly to view all expense reports in pending status
- Targeted reach out is done to inform the traveler what is needed for the expense report

Name:

Travel Dates: 9/14/18 - 9/15/2018

Destination: Atlanta GA

Please supply the following documentation/information:

Per Diem Report

Receipt for Airfare (not purchased through Anthony Travel)*

Receipt for Hotel*

Receipt for Registration

Receipt for Misc (parking, taxi, baggage fees, etc.)

Receipt for Car rental*

Receipt for Gas for car rental

Other Comments: :

Please reply to this email with supporting attachments.



Operations Support Services

Travel Questions

- If you have any questions about your travel, contact businessops@louisville.edu



Travel Estimation/Expense Form

Communications

Travel Estimation to Reimbursement Communications

