

# JEFFERSON LAB

## Travel Update Seminar



# Seminar F O C U S



- Approvals Needed to Travel
- Local Travel
- Foreign Travel
- Conference Attendance
- Electronic Expense Report
- Using Trip Manager
- Travel Credit Card
- New Hire Relocations
- Future events

# JLab Electronic Approvals

## Travel Authorization

- Submit for approval
- WAPPR status
- Approved notification
- SUBMIT status

## Expense Report

- Duration changes
- Charge Code change
- Destination added
- Payment of expenses not authorized on TA
  - Air, car, lodging, per diem
- Actual cost exceeds est. by 25% or more.

# DOE/OS APPROVALS

## SENSITIVE COUNTRY

### CONFERENCES

- 90 business days before event start date create TA and link to conference
- 75 business days before event start date – conference submitted to OS for approval. (major conferences may take longer)

### FOREIGN TRAVEL

- 60 business days before departure date from US – Enter RFT in FTMS.
- 21 business days before departure date from US – country clearance requested
- 1-15 bus. days before departure date from US – receive approval from TS to travel.

# DOE/OS APPROVALS

## Non-Sensitive Country

### CONFERENCES

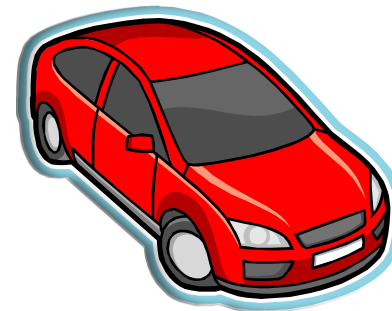
- 75 business days before event start date create TA and link to conference
- 60 business days before event start date – conference submitted to OS for approval. (major conferences may take longer)

### FOREIGN TRAVEL

- 45 business days before departure date from US – Enter RFT in FTMS.
- 30 business days before departure date from US – country clearance requested
- 3-5 bus. days before departure date from US – receive approval from TS to travel.

# Local Travel Policy

- **Definition** – Incidental Official travel within a 50-mile radius of the traveler's assigned work site (or within a 50-mile radius from the point-of origin-when away from the work site on unofficial travel), or does not exceed a total travel cost of \$100.00.  
(TJNAF AD 402.01-B)
  - Eligibility for
    - » Lodging
    - » Per Diem
  - POV Mileage



# Calculating POV Mileage

- Travel on a business weekday–
  - Mileage to/from the local destination, from home or work, whichever is the lowest cost.
- Travel on a weekend or holiday–
  - Mileage to/from the local destination, from home.

# FOREIGN TRAVEL



Definition – travel to a foreign country and return or travel between foreign countries by persons, including foreign nationals, whose travel expenses will ultimately be funded by DOE.  
(TJNAF AM 402-01.B & DOE O551.1C)



# FOREIGN TRAVEL

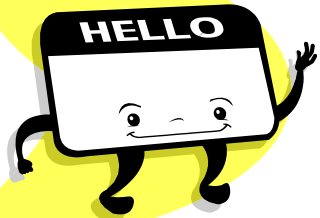
- Funding codes
- New Information for personal leave required by ECC (E Country Clearance) will be added to box 26 section 2
- Anyone that is interested in having a session on foreign travel should send me an email and I will get something set up either on an individual basis or as a group if enough interest is determined
- FTMS notes hand out

# CONFERENCES

- Definition – any event attended at DOE expense where information will be shared, except
  - Local travel
  - Reviews
  - Planning sessions
  - Vendor visits
  - Meetings (i.e., collaborations)



(DOE O110.3)



- On TA, indicate CONF is DOE or Non-DOE – not trng.
- TA, linked to conference requirement

# TC Responsibilities

- Ensure travel projections are up-to-date
  - M:Travel\Projections-Foreign & Conf\FYxx-Travel Projections
- Send request to [travels@jlab.org](mailto:travels@jlab.org) to add conference to database, provide:
  - Name
  - Location
  - Dates (conference dates not travel dates)
  - Website where conference is identified
  - Benefit to Office of Science (if requested)
  - Impact Statement (if requested)
- Create TA according to critical success dates
- Link TA to conference

# Electronic Expense Report

- ❖ Location: Travel – Form webpage
  - ❖ Instructions: See 3<sup>rd</sup> worksheet on spreadsheet
- ❖ Links: Per diem rates, meal deductions, more
  - ❖ Verify Totals
- ❖ Traveler's Signature
  - ❖ Transmission via Email
- ❖ Receipts

**REQUIRED AFTER MARCH 1, 2009**

# TC Responsibility

- Submit expense reports to TS within 3 business days of receipt on your desk with all back-up documentation needed.
- Remind travelers of JLab policy: (402-01.A)
- Upon return from travel an expense report is due
  - Domestic travel – 5 days after return
  - Foreign travel – 20 days after return date
  - Foreign trip report – 20 days after return (in order to get reimbursed for out-of-pocket expenses)

# USING TRIP MANAGER



Required for:  
single destination,

airline tickets

Recommended for:

car rentals

hotel reservations

- Contact [travels@jlab.org](mailto:travels@jlab.org) to get an account for you or a traveler or to ask questions.

# TRIP MANAGER

- Frequently Asked Questions
- Update your profile
- Address any questions or concerns

# Travel Credit Card

- Eligibility –
  - JLab employee's only
  - No prior travel card terminations
- Who should have a travel credit card –
  - Employees who travel more than twice in an 18 mo. period who do not want to use their own funds or credit for travel.
- Why have a travel credit card -
  - Get advance cash for travel just prior to departing
  - No need to use own funds or personal credit cards

# NEW HIRE RELOCATION

1. Make initial contact
2. Make travel arrangements if not traveling via POV
3. Volunteer to make temporary lodging arrangements
5. Submit 2 - TA's one for
  - Transportation (airline tickets or POV mileage & en route lodging if required.)
  - Temporary lodging
6. Promptly submit ER's for expenses and to pay per diem

**REMEMBER:** Relocation payments come through Payroll – so there could be up to a 30 day delay. (YES – a cash advance for per diem can be arranged once they arrive.)

# ROUNDTABLE MEETINGS

- WHO
  - Travel Coordinators & Travel Services
- WHAT
  - Discuss topics of travel interest (policies, procedures, travel trends, industry changes, issues with hotels, car rentals, or travel agency).
- WHEN
  - Once every 3 or 6 months for 1 to 2 hours.
- WHERE
  - At a JLab conference room or a hotel meeting room
- WHY
  - To share information and talk about interests and concerns.