

For travel, there are a few items to gather and keep top of mind. This by no means includes all travel requirements, but it should serve as your guide to prep and plan for travel expenditures.

Please notify your admin/FA if you are considering future travel, so you can be added to the internal tracking sheet. Notifying the admin team early helps prevent potential travel issues.

Ahead of booking any travel:

1. Review the attached travel policies guide.
2. **Collect approval to travel from department chair, if required.**
 - a. Domestic: 30 days
 - b. International: 4-6 months
 - c. **Approval required before booking travel charged to:**
 - **Startup**
 - **Foundation**
 - **Internal Grants**
3. File an Off-Campus Authorization (OCA) for international travel; must be obtained at least 90 days prior to travel dates.
 - a. Because the approval turnaround time is long, when you file your OCA, SAVE the emailed receipts of submission and approval.
4. Collect funding source account string(s) and alias(es).
 - a. If you are charging to a grant, ensure with your FA that the grant does cover travel.
5. To which credit card are you booking travel?
 - a. Personal card
 - If you're charging to your personal card, you may not file for reimbursement until after the event has occurred
 - b. Pcard
 - If possible, we suggest using a departmental pcard for booking hotel, flight, rental car, etc., so it does not come out of your own pocket in advance. Travel purchased on pcards get reconciled immediately and posts to the funding accounts before travel takes place.
 - If you do not have a pcard, reach out to your PI or the admin team to arrange booking via their pcard.
6. Are you adding personal time to the trip?
 - a. If so, you **MUST** collect a flight comparison to show the flight you are purchasing with added personal days is less expensive than the flight you would purchase for only business travel days.
 - b. Flight comparison must be from the same airline(s).

- c. The flight comparison/screenshot must be captured the day you purchase your flight.
- d. If your flight will be more expensive with the personal days added, purchase it with your own personal card. Note you will only be reimbursed the amount of the cheaper flight (the flight for just business travel days).

When booking travel:

1. If you book lodging using a pcard you will not have on-hand at the time of travel, you will likely want to ask the hotel for and file a Credit Card Authorization form and send it to them. Otherwise, you will likely be asked for a credit card on check-in, which they will then charge on check-out.
2. If the hotel is exorbitant but there are no other cheaper options, it's a good idea to get a comparison of that as well.
 - a. Note that resort fees may not be charged to a grant, even if unavoidable for your choice of lodging. These will need to be itemized and charged to a general ledger account.
3. Economy (non-refundable) class only for flights (seat choice option is allowed, but no seat upgrades are allowed regardless of funding source)
 - a. Your receipt should show:
 - All the taxes listed out
 - Full flight itinerary
 - Class of flight
4. Airfare charged to Federal grants must be on a US flag carrier (an airline owned by an American company). The flight may be on a foreign airline if that carrier operates via an American carrier.
5. Car rentals: do not purchase additional domestic insurance: Risk Management will provide insurance coverage for OHSU employees.
6. More information on [allowable and non-allowable expenses](#)

When traveling:

1. KEEP YOUR ITEMIZED RECEIPTS!
 - a. This includes Lyft/Uber with To/From destinations; Taxis, Car Rental, etc.
 - b. Any purchases made on a pcard
2. Meals
 - a. If you are charging meals to a pcard you may NOT also do per diems. It's either/or.
 - b. If you are charging meals to a pcard or debit card and not doing per diems, you MUST keep an itemized receipt including what you ordered and tip
 - c. DO NOT PURCHASE ALCOHOL ON THE SAME TAB AS YOUR MEAL OR CHARGE ALCOHOL TO PCARDS

- d. We suggest using per diems as it is frequently much easier than keeping itemized meal receipts ([per diem rates per location](#))
- e. Pay for only your own meals when not provided by the event; and if traveling with a group, avoid paying for other members of your party.

For reconciliation, compile all the following in one pdf.

You will need:

1. Grant Travel Information Form
 - a. If the travel will be charged to a grant, this form should be used and placed first in your travel documentation; it is used to track expenses for each specific trip
 - b. If the travel is charged to a non-grant travel award, foundation or general ledger account, you do not need the Grant Travel Information form.
2. Permission to travel
3. Off Campus Authorization (international travel)
4. Conference registration
5. If you are presenting, title of your talk/poster and speaker confirmation or poster presentation acceptance
6. Robust justification for travel if you are not presenting
7. Full event agenda showing dates/location of conference
8. Flight itinerary to show your travel dates
9. **Itemized** receipts for everything you intend to reconcile and what they are for
10. Did you do per diems or itemized meal receipts?
 - a. If you did per diems, include the meals you will NOT need reimbursement for
 - For example, did the conference provide lunch? If so, you will need to deduct that from the meals reimbursed
 - b. Include your flight itinerary if you are filing for per diem reimbursement to verify the dates/times you flew, as proof of your hours of business.

* Reimbursements are taxable if not processed within 60 days of travel *