Traveling Can Be A Real Trip!
The travel process can be very difficult and very involved. There are many steps that need to be followed in order to comply with policy and make life easy for the employee, faculty member or student who is travelling. Our goal is to share with you our tips and tricks to simplify the process both pre & post trip.

*Please note that this information is generated from our business office and is not meant to be a mandate from FSO Travel.

This presentation consists of tips, tricks, resources and forms that we as the FSO Administration business office find helpful. Enjoy!

Travel Tracking – Hunting Down The Information You Need
Keeping track of all of your travelers at once can be difficult. Here is an example of the spreadsheet we use to ensure all the necessary steps are complete before our employees travel. This is also something you can reference quickly to locate an eDoc number or a T number.

You can use conditional formatting to make life even easier. For example the Pre Encumbrance eDoc cell is shaded red because there is no eDoc number entered.

In FSO, we keep this spreadsheet in a central folder (in the R Drive) so that everyone from the Administration team can view this information. This is especially helpful if you have more than one employee that works with travel arrangements or reimbursements as it reduces the changes of duplicate effort.

Having a database where all travel for the year is tracked can also help if your department wants to provide metrics on travel. FSO Administration can easily create a pivot table that shows us how many people traveled and the costs associated with the year's travel.

Travel/Receipt Envelope
The FSO travel envelope is extremely helpful when organizing travel while helping the traveler keep all of their trip documents at hand. Before the traveler leaves for their trip, FSO Administration puts a copy of the conference registration, flight itinerary, hotel reservation and anything else that may prove helpful to the traveler while they are out in the travel envelope.

A team member of FSO Administration personally hands each traveler his/her travel envelope.

At this point it is a good time to review what a “good receipt” is, and what can and cannot be reimbursed to the traveler before they leave for the trip and answer any last minute questions.

The outside of the envelope has important traveler information, as well as the per diem allowed and travel tips. All you have to do to print this is put an envelope in your printer’s bypass tray and away you go.

Do You Want These Documents?
Would you like a copy of the Per Diem Worksheet or the Travel/Receipt Envelope?

Please contact Erin Howden at 621-3220 or Mary Moore at 626-0823 to get a copy of these documents emailed to you.

Questions? We are always happy to take your call.

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UAccess Financials

- When reconciling an airline P Card transaction, remember to mark it as tax exempt because the tax is included in the total fare price
- Always include the T number in the Org Doc # field
- Use the “detailed search” option in Financials to find all documents that contain the same T number in the “Org Doc # field”

Tips From FSO Travel Employees

- When the traveler is staying in designated lodging, please attach back up information for designated lodging to the Travel Authorization or Travel Expense Report that is submitted to A/P Travel. This back up information should be from the event sponsor and indicate that the lodging has been designated for the event. – FSO Travel Employee
- When a traveler goes anywhere in Yavapai county (Ex: Prescott) it is set as the default rate. When looking at the State of Arizona Meals per diem Travel Policy, its states that Sedona (which falls within Yavapai and Coconino County) is set at a higher rate. Everything else outside the city of Sedona is set at a different rate. – FSO Travel Employee
- When paying expenses for a non-UA Employee, ensure to clarify in your business purpose that there is a benefit to the University and not solely to the individual. – FSO Travel Employee
- Verify that proof of payment is visible on every receipt. – FSO Travel Employee

Planes, Trains, and Automobiles

Google Flight Search is a phenomenal tool to compare multiple airlines and find the best price for your trip and avoid those pesky booking fees from other online booking websites.

www.google.com/flights