Travel Authorization Guidelines

For the full policies, please see https://www.usu.edu/travel/procedures

Day Trips:

You do not need a TA if the following is true:

- It is less than 12 hours
- No overnight stay
- No reimbursement is necessary
- No group travel involved

However, if a day trip involves a group, you will need to create a TA. Please attach a spreadsheet with a list of every travelers’ name, A number, and emergency contact info.

Overnight Travel:

Please submit all TA’s at least one week before travel to obtain proper approvals.

- If a Student is traveling/staying overnight
  - Lodging has to be selected, even if you’re not paying for it
  - Put down the address where the student will be staying (required per Clery Act)
  - If no money is being requested, put University Paid and $0.00
- For Individual Meals
  - If you choose Actual, you will need to attach itemized receipts (not just credit card receipts) to your TR
  - You cannot combine per diem and actual receipts. It has to be one or the other for the entire trip
- If travel is in Utah and you are using a USU ALLCard, ask for sales tax to be removed. The tax exempt # is on the card
- For Lodging and Airfare put in an estimate if actual amounts are unknown at time of submission of TA
- If traveling with others, please mark Group Travel and then mark down their names and TA numbers in the comments
- Rental cars can be reserved using the USU rate. Please contact Business Services with the following information:

  Name of person:
  Age of person if under 25:
  Pick up location/ Drop off location
  Date/time of pick up
  Date/time of drop off
  TA number (there must be a TA associated with the rental)
  Index you would like charged:
  Account Code:
  Phone number of the person renting the vehicle:
  Type of vehicle/seating needed
Open TAs (Day Trips)

Open TAs are for day trips that are less than 12 hours and are for **mileage reimbursement only**. No other reimbursements should be submitted on open TAs. Please submit the mileage logs on a monthly basis to keep financial accounting current.

- To create an open TA, go to the Travel Dashboard and click New Travel Authorization

**TRIP INFORMATION**

1. **Purpose Year Open**
2. **Departure/Return Dates**: Date the entire time you will be making these trips
   - If the trips are over multiple semesters, an open TA should be created for each semester
3. **If you are going to multiple destinations**, please mark each destination select “Various Cities” as destination city
4. **Open TAs should be reconciled on a monthly basis**
   - Please use the Travel Office mileage log template to track your mileage throughout the month
     - [https://www.usu.edu/travel/files/mileage-log-template.xlsx](https://www.usu.edu/travel/files/mileage-log-template.xlsx)
   - At the end of the month, create a TR for the mileage reimbursement
   - Attach monthly mileage log to your TR when submitting
5. **You can create multiple TRs from the same TA**

**Travel Reimbursement Information**

After completing your Travel Authorization, you are able to submit documentation for reimbursement through the Travel Reimbursement process.

- You can create a TR once a reimbursable purchase has been made, even before the trip has been taken place
  - EX: if you buy a plane ticket for a conference, you can get the process started on your reimbursement before you fly
- You can create multiple TRs from the same TA
  - You don’t need to wait for all purchases to be made before submitting a TR
- If you don’t have the funds to pay for an expense up front, you can use a BSC PCard
  - Please contact Jayne Hamblin ([Jayne.Hamblin@usu.edu](mailto:Jayne.Hamblin@usu.edu)) to setup a time to help coordinate the purchase. If Jayne is not available, you can contact Justin Bailey, Anna Hafoka, or Alisha Beus in the BSC office.

If you have any questions please contact Jayne Hamblin. [Jayne.hamblin@usu.edu](mailto:Jayne.hamblin@usu.edu)