



Travel Management System (TMS)

JOB AID # 8.03

Date: 06/20/2016

Job Aid Description: Best Practices for Travelers

General

- In accordance with the State of Georgia policy, employees are to submit all travel expense reports for reimbursement within 10 days of the completion of the event or trip, but **no later than 45 calendar days**. IRS regulations require employees to submit travel expense reimbursement requests within 60 days of the end of the trip. Such expenses, if reimbursed after 60 days, become taxable income to the employee and will be reported on the employee's W-2 Form.
- Check your TMS Profile and confirm that your Default Approver/Manager is correct.
- Check your TMS Profile and confirm that your Default Speed Chart is correct.
- Non-travel employee reimbursements must be completed through ePro.
- Travelers should keep paper copies of receipts/agendas for 3 years.
- Whenever you change SpeedChart ALWAYS insert that department/budget owner in the approval flow, as it will not be done automatically by the system. Your default approver/SpeedChart will always be triggered automatically to approve.

Travel Request

- Always create a Travel Request and receive approval to travel BEFORE booking airfare, hotel, and car rentals.
- Include on Travel Request on the "Pre Paid Registration" segment, any travel-related items to be paid outside of TMS (via P-Card or ePro), such as a conference registration.
- Always check the Approval Flow and insert any additional required approvers (business manager, project manager, supervisor, etc.) before submitting.

Booking Travel

- Book all reservations at the same time when possible, as there is a small transaction fee per booking. Booking all segments of your trip at the same time helps reduce costs!
- Select the lowest air, hotel and car fare when possible. The standard window for booking the lowest domestic airfare is between 14-21 days prior to departure. For international flights, 6-8 weeks in advance of departure.
- Any exceptions (i.e. spouse traveling or adding personal days) to booking travel in TMS will need cost justification and/or explanation and prior trip approval by supervisor.
- Travelers can "**Void**" an airline ticket by replying to the email booking notification ≤ 24 hours from the time of the notification. (Travel, Inc. booking fee still applies)
- Travelers can "**Cancel**" an airline ticket through their Trip Library or by calling Travel, Inc. ≥ 24 hours from the time of time of the email booking notification. (Travel, Inc. booking fees and airline cancellation fees still apply AND ticket is not refunded, but can be re-used)
- Only Default approver will receive booking notifications.
- Confirmation email for hotel booking will reflect the actual rate/conference rate.
- If sharing a hotel room with another KSU faculty member, have only one traveler make the reservation under his/her profile and include a comment in the Report Header, noting who shared the room.
- You cannot book airfare for your spouse in TMS. To book a same flight for your spouse, you can call Travel Inc. and they will assist with you with the booking. You will have to provide a personal credit card for your spouse's airfare and travel agent fees and you will be charged a travel agent fee for the service.

Cash Advance

- Enter the purpose of the Cash Advance in the Comment section of the Cash Advance Request.
- You cannot change the SpeedChart on Cash Advance Requests. Your default approver is approving that you may receive a cash advance. You will resolve the actual SpeedChart when you complete an Expense Report.

Expense Report

- Personal Car Mileage: Departure location is your actual departure location with deduction for any commute miles when necessary.
- Complete one Expense Report per trip, as there is a small transaction fee per expense report.
- Check the report SpeedChart to confirm correct budget/department number before submitting for approval.
- Check the Approval Flow and insert any additional required approvers (business manager, project manager, supervisor, etc.) before submitting.
- Set-up a Trip Itinerary for each expense report, even if per diems are not being claimed.
- Select "In State" or "Out of State" appropriately when completing the Trip Itinerary.