ITS guide
travel planning

When ITS employees request to attend a conference/training, etc., an employee should contact the ITS HR team for an <u>estimate on approximate costs</u> to attend the conference/training. If the Supervisor approves the conference/training, the Supervisor must submit a written request to their Director. If their Director approves the conference/training, the Director will submit a request to ITS HR (primary contact is Marlene Crombie).   ITS HR forwards on the request to the CIO and all the Directors for approval. The CIO and the Directors must respond to ITS HR before any planning can begin.

<div align="center">

<u>ESTIMATING THE TRIP (PRIOR TO ANY APPROVAL)</u>:

</div>

The following information must be provided to ITS HR in order to estimate approximate travel costs (food & miscellaneous expenses) prior to any approval:

- Date
- Registration
- Hotel
- Transportation
- Other expenses
  ITS HR will go to Travel and Transport at travel.unl.edu and/or Swabiz.com to estimate transportation costs on the dates determined.

If travel is approved, ITS HR will obtain the following information:

<u>PLANNING THE TRIP (Approval provided from The CIO and all Directors)</u>.

1. Supporting email from ITS HR that the CIO and the Directors have approved the travel.
2. Registration information for training/conference the employee plans to attend. If there is a fee, ITS HR will paid the fee using an ITS P-card.
3. The employee must let us know how they plan to travel to the event. Their decision may be based on a number of factors such as the location of the training/conference, time constraints, most economical, etc. **(see Transportation Planning)**.
4. ITS HR personnel will start the Travel Authorization Form (TA is a pre-trip request for reimbursement and authorization of travel for mileage and insurance purposes) and a Purchase Request (PR) through the ITS Purchase Request System at https://prs.unl.edu/.
   The correct cost center for billing must be provided to ITS HR for the TA and the PR.

ITS HR will go to Travel and Transport and/or Swabiz.com (Swabiz is Southwest Airlines).

1. **ITS HR will find the flight that best fits the need of the traveler and book the flight thru Travel and Transport or Swabiz.com.** If the employee has never traveled before as a UNL employee, ITS HR will set up a profile for the employee.
2. You will receive an email invoice from **CONCUR** then another email from Travel and Transport and an invoice from Travel and Transport.   The third email you receive is the invoice and you should make a copy of this for your records.

3. An employee must book their own hotel. The fee for the hotel will be part of their reimbursement. Typically there is a block rate that is usually cheaper than what we can get on Hotels.com. If we can book the hotel through UNL's Hotels.com, ITS HR will use the provided cost center for billing.

AFTER THE TRIP

1. *The employee will send all receipts to ITS HR to process the Employee Expense Voucher*. Hotel bill/receipt must show a zero balance.

2. **Food receipts must be the itemized receipt of anything that was purchased.** If alcohol was purchased, it will be crossed off the ticket and the employee will be reimbursed for the food and non-alcoholic beverages, plus the tax on that amount and tip adjusted to that amount. If possible, please purchase alcohol separately.

3. **Miscellaneous receipts are needed for any charges from taxis, shuttles, parking, baggage claim, etc.**

4. **Expense reimbursement requests must be received in the UNL Accounting Office no later than 60 days after the final day on which expenses were incurred.**   Keep in mind that ITS HR & ITS-Accounting must have time to process the appropriate paperwork prior to sending to UNL Accounting.

5. **ITS Accounting will process the paperwork and forward to UNL Accounting.** A scanned copy of your reimbursement will be sent to the employee via email by UNL Accounting through an SAP electronic document that requires an employee's electronic signature.