The Travel Process

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Example Training Trip to Chicago
Scenario

I was promoted to Principal Investigator* in the new IU COVID-19 labs. I need to travel to Chicago for a week-long lab training with Dr. Fauci and his team. Flying is out of the question, and I need to book lodging that includes a kitchen due to my unique dietary restrictions. What do I need to do to plan this trip compliantly?

*OK, not really
Travel To-Do List

Step 1: Price out the trip using a DTA
Step 2: Submit Pre-Approval
Step 3: Reserve Motor Pool & lodging
Step 4: Reconcile prepaid lodging expense
Step 5: Travel!
Step 6: Request reimbursement
Step 7: Expire PA
Step 1: Pricing Out the Trip

- What will I need on this trip?
  - **Motor Pool** - $36/day x 5 days = $180
  - **Per Diem** - $76/day x 3 full days +
    $57/day x 2 travel days = $342
  - **Lodging** - [demo in Egencia]
Step 2: Submit Pre-Approval report
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My trip’s approved!
Step 3: Reserve Motor Pool & Lodging

Step 3: Reserve Motor Pool & Lodging
Step 4: Reconcile Pre-Paid Travel
### Step 4: Reconcile Pre-Paid Travel

<table>
<thead>
<tr>
<th></th>
<th>Expenses</th>
<th>Pre-Approval</th>
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<tbody>
<tr>
<td><strong>Draft</strong></td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td><strong>Returned</strong></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Submitted Last 90 Days</strong></td>
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**Approvals Needed**
- 10 Expense Reports
- 10 Pre-Approvals

**QA TESTING SYSTEM**

**UNTIL FURTHER NOTICE:** All Air and Hotel reservations **MUST** be booked via a Designated Travel Agency (DTA). Reimbursement for travel booked and paid out of pocket may not be reimbursed unless exception approval from the Fiscal Officer is provided.

Travel guidance related to COVID-19 is available on the Travel website. COVID guidance is mandatory.

Visit the following resources regarding COVID-19:
- COVID-19 Travel Guidance
- SOP - Travel Reimbursement for Travel Impacted by COVID-19
Step 5: Travel!

Remember to keep all receipts!
Step 6: Request Reimbursement
Step 7: Expire PA Report

[Expiration Demo]
Resources

• Get an Egencia Traveler Account | Egencia Arranger Account
• Submitting Pre-Approval
• Reconciling Prepaid Expenses
• Expiring a PA
Thank you!

What questions do you have?

If a dog wore pants would he wear them like this or like this?