SUMMER TRAVEL GUIDANCE

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EFFECTIVE MAY 10, 2021

New summer travel guidance was published on the Travel website.

Click here to read the full guidance
### WHAT’S NEW?

<table>
<thead>
<tr>
<th>Previous Guidance – <em>Then</em></th>
<th>Guidance After May 9, 2021 – <em>Now</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel to conferences was prohibited.</td>
<td>Travel to conferences is permitted.</td>
</tr>
<tr>
<td>FO/Travel Approver AND Executive must approve domestic trips via Chrome River pre-approval.</td>
<td>Only FO/Travel Approver must approve domestic trips via Chrome River pre-approval.</td>
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<tr>
<td>All employee and non-employee travel must be booked via DTA.</td>
<td>Employee travel should be booked using a DTA, but DTA use not required for non-employee travel.</td>
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WHAT HASN’T CHANGED?

- Pre-Approval is here to stay. You still need PA for all IU-sponsored travel expense reports, including campus-to-campus trips.

- Other means of conducting business still strongly encouraged.
  - Evaluate risk of travel using CDC guidance for travel and gatherings.
  - Follow CDC and local restrictions at your destination. Please wear a mask and practice social distancing in addition to CDC guidance.
  - DTAs provide guidance on local restrictions

- Booking employee travel through a DTA still required, although exceptions are allowed at the discretion of your travel approver.
### Do I need Pre-Approval (PA) if…

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>The traveler is a non-employee?</td>
<td>Yes, if IU is funding the trip.</td>
</tr>
<tr>
<td>A third party is paying for the trip?</td>
<td>No.</td>
</tr>
<tr>
<td>IU Foundation (IUF) is funding the trip?</td>
<td>Yes. IU pays first, then IUF reimburses IU via an ETA transfer eDoc.</td>
</tr>
<tr>
<td>The trip is grant-sponsored?</td>
<td>Yes. Since the funding will come out of an IU account, PA is required.</td>
</tr>
<tr>
<td>My only expense is Motor Pool? Or Per Diem? Or mileage? Or mileage within</td>
<td>Yes.</td>
</tr>
<tr>
<td>the same city? Or parking? Or intercampus?</td>
<td></td>
</tr>
</tbody>
</table>
• ALL travel report types require Pre-Approval.
  • Employee Travel
  • Student Travel
  • Non-Employee/Non-Student Travel
  • Recruiting Travel
  • Student Group Travel
WHAT ARE SOME COMMON EXCEPTIONS TO THE DTA REQUIREMENT?

- Destination is remote.
- Driving to a destination that requires an overnight stay while in route.
- Traveler is a non-employee.
- Booking hotel with discounted conference rate.
- Cheaper rate found elsewhere
- Opportunity to use a travel voucher from a previously canceled air/hotel reservation that was booked using personal funds.

[DTA Exception Guidance Page]
HOW DO I DOCUMENT MY EXCEPTION?

• Obtain pre-approval in Chrome River including comments explaining the exception
  • Your FO/Travel Approver will approve or return the PA

• The more information in more places, the better
  • Add comments and attachments to your PA and your Expense Reports
  • Comments and attachments help your approvers understand your request and you’re less likely to encounter delays in reimbursement

YOU GET A COMMENT!

YOU GET A COMMENT!

DTA Exception Guidance Page
HOW DO I BOOK A HOTEL ROOM USING A CONFERENCE DISCOUNT?

• There’s a DTA exception for that!

• [DTA Exception Guidance Page](#). As a spoiler:
  1. Obtain pre-approval in Chrome River including comments explaining the exception
  2. Book the room on a personal credit card
  3. Request reimbursement via Chrome River, including PA & comments to explain the activity
AIRLINE VOUCHERS/CREDITS

- What is an airline voucher/credit?
  - Like in-store credit, a voucher is usable funds towards the purchase of a flight. Usually results from canceled airfare.

- When should I use my flight voucher?
  - Anytime before it expires! You can call Egencia and ask for the expiration date to be extended.
AIRLINE VOUCHERS/CREDITS, CONT’D

- I won’t be traveling for business before it expires. Can I transfer a university-sponsored flight voucher to another IU employee?
  - It depends. Email travel@iu.edu for specific scenarios.

- I won’t be traveling for business before it expires. Can I use a university-sponsored flight voucher for a personal trip and reimburse the university?
  - Preferably, ask Egencia for an extension of the expiration date.
  - If you can’t get an extension, using the credit for personal travel can be allowed.
  - Log comments on Chrome River PA and expense reports
  - Email travel@iu.edu for further guidance
Where can I look for guidance and announcements related to international travel?

• International travel, both outgoing from the U.S. and incoming to the U.S., is covered by guidance issued by the Office of the Vice President for International Affairs (OVPIA).

• Travel Management Services (TMS) does not issue guidance related to international travel. Reach out to OVPIA with questions.
Resources

- **New summer travel guidance** – effective May 10, 2021
- **DTA exception guidance page** – includes how to book a hotel with a discounted conference rate
- **Using Airline Credits in Egencia** – describes how to apply unused credit to a flight in Egencia
- **Updated Travel FAQ page** – updated to cover new summer guidance
- **International travel guidance** – Office of the Vice President for International Affairs (OVPIA)
- **Travel training page** – includes pre-approval and expense reporting documentation
- **The Travel Bulletin** -- Subscribe to the travel newsletter or [view recent copies](#)

- CDC Guidance for Large Gatherings
- CDC Guidance for Fully Vaccinated Individuals
- CDC Guidance for Domestic Travel

- Email the Travel Helpdesk: [travel@iu.edu](mailto:travel@iu.edu)
COMING THIS JULY AND AUGUST 2021

• Summer Travel Webinars!
• Bite-sized, focused
• Individual sessions covering booking travel, expense reporting, and approving
• Look for info in late June in the Travel Bulletin(s) and on https://travel.iu.edu and https://training.iu.edu
QUESTIONS?

Enter them in the Q&A!
THANK YOU

travel@iu.edu

https://www.travel.iu.edu/
Acronyms in this presentation

- **DTA** = Designated Travel Agency
- **PA** = Pre-Approval for a trip
- **TMS** = Travel Management Services
- **OVPIA** = Office of the Vice President for International Affairs
- **CDC** = Center for Disease Control (Government)
- **CR** = Chrome River