AGENDA

- Introduction of Staff
- Announcements
- Shared Travel Services Overview
- Triplt
- Tips and Tricks
- Questions & Answer
SHARED TRAVEL SERVICES
STAFF

EXECUTIVE GROUP

- School of Natural Resources and Extension (SNRE), Lead Unit: Michelle Pope, 474-7935
- Geophysical Institute (GI), Joined 7/1/15: Dave Read, 474-6011
- School of Fisheries and Ocean Sciences, Institute of Marine Science (SFOS-IMS), Joined 9/21/15: Jennifer Harris, 474-7111

TRAVEL STAFF

Email: uaf-shared-travel-services@alaska.edu
Location: 172 Arctic Health Research Building

- Travel Authorizations: Rachel Jeppsen, 474-7305
- Travel Procurement: Katie Ridenour, 474-5573
- Travel Expense Reports (Paper): Serena Likar, 474-5994
- Travel Expense Reports (TEM): Adam Dewey, 474-2734
ANNOUNCEMENTS

Office officially closed December 21, 2015 through January 8, 2016
All trip requests or travel inquiries need to be received by December 16th in order to be processed before the closure

ANNOUNCEMENTS

STS will be sending out a monthly newsletter. It will contain important announcements and Tips and Tricks to make travel processing easier.
We are spotlighting traveler’s pictures in the newsletter. Send entries to the STS email.
ANNOUNCEMENTS

• 1st Quarter numbers (July-September)
  – Trip requests received: 445
  – Travel authorizations approved: 326
  – Expense reports received: 118
  – Expense reports submitted to UAF Central Travel: 101

SHARED TRAVEL SERVICES OVERVIEW

TRAINING OBJECTIVES

• Goals and Advantages of Shared Travel Services
• Shared Travel Services Role
• Shared Travel Services Forms
• Travel Process in Six Simple Steps
GOALS AND ADVANTAGES OF SHARED TRAVEL SERVICES

GOALS
- Increased Ease of Use
- Better Customer Service
- Time Savings
- Use of Expert Resources
- No Down Time

MAJOR ADVANTAGES
- Shared Travel can purchase travel components directly, reducing need for travelers to create airline holds and personal/business comparisons (the Travel Office will take care of these elements)
- Travelers avoid heavy financial burdens of travel
- Easy to use forms, minimal TEM use
- Travelers have access to responsive and customer oriented travel office
SHARED TRAVEL SERVICES ROLE

• Works from Traveler Profile and Trip Request to plan travel
• Acts as TEM delegate to make reservations and purchases
• Creates itineraries to be approved by traveler
• Assists in expense reimbursement once travel is complete
• Answers questions and addresses concerns about the travel process

SHARED TRAVEL SERVICES FORMS
TEM PROFILE

- Travelers Create TEM Profile
- Travelers choose delegates and approvers
- Important Information
  - Address and e-mail
  - Direct Deposit Info

TRAVEL PREFERENCES

- Filled out once by travelers
- Contains traveler information needed to book or make reservations
  - Legal name, ID #, etc.
- Includes traveler preferences
  - Preferred airline, hotel, rental car, etc.
- Will be referenced to create travel authorizations in TEM
  - http://goo.gl/forms/YYizLsBe58

TRIP REQUEST FORM

- Will be filled out by traveler requesting upcoming trip
- Will include pertinent information like dates, location, purpose, etc.
- Will be used by the Travel Customer Service Rep to create itinerary in TEM
  - FY16: http://goo.gl/forms/LYZbzCKdEO
THE TRAVEL PROCESS IN SIX SIMPLE STEPS

- Create Profiles
- Create Trip Request
- Approve Itinerary
- Travel
- Submit Travel Expenses
- Submit Expense Report

STEP 1: CREATING YOUR PROFILES

- TEM (if applicable)
  - Traveler must log on to TEM and designate delegate and approver

- Traveler Preferences Form
  - Information includes
    - Full legal name
    - Frequent Flyer plan number
    - Preferred airline and hotel
STEP 2: CREATING A TRIP REQUEST

• Traveler fills out Trip Request for upcoming travel at least one week prior to travel
• Trip Request includes:
  - Reason for trip (conference, meeting)
  - Dates and location of trip
  - Trip Components (lodging, airfare, rental car, etc.)
  - Funding source including FUND and ORG numbers
  - Detailed itinerary with personal and business days indicated

STEP 3: APPROVING THE TRAVEL AUTHORIZATION

• The Travel Coordinator uses the Trip Request to create a Travel Authorization Report (AT) in TEM or a paper Travel Authorization Form (TA)
• If more information is needed, traveler works with Travel Office to create accurate documents
• TA is routed for approval through Workflow (for AT) or DocuSign (for TA)
• The Travel Authorization number (AT# or TA#) should be used as subject line for all emails regarding trip

STEP 4: ENJOY YOUR TRIP!

• Travel is conducted according to travel authorization
• Travelers may use their Individual University Travel Card for hotel, rental car, and transportation purchases (reservations will be held with travel office card).
• Please save your receipts and track mileage if necessary
STEP 5: SUBMITTING TRAVEL EXPENSES

- Once the trip is complete, the traveler submits all reimbursable expense receipts and relevant backup to travel office within two weeks
- Uaf-shared-travel-services@alaska.edu
- Email subject line should include the Travel Authorization number (AT# or TA#)
- Travel office will compile receipts and backup, work with traveler to create the final expense report.

STEP 6: EXPENSE REPORT APPROVAL

- Travel Coordinator will complete Expense Report (ER) in TEM. Traveler logs in to TEM, reviews completed Travel Expense Report, and submits for approval
- Travel Coordinator completes Travel Expense Report (TER) paper form and routes for approval through DocuSign
- Final audit and payment keying is done by UAF Financial Services

TRIPIT DEMONSTRATION
TripIt Intro

- TripIt Email Example
- TripIt Website View
- TripIt App

Available on Google Play
Available on iTunes
Available at Amazon
• TripIt option on Trip Request Form

• TripIt as expense report tool
  1. Take (clear) pictures of receipts
  2. Make comments on per diem claimed, special situations, oversize car rental justification, etc.
  3. Email the Shared Travel Services group to let us know you’re done adding receipts and that we should use your TripIt to create your expense report.

QUESTION AND ANSWER SESSION