This guide pertains to classified and unclassified employees from the departments that have their payments processed through the AABC-SEC office in the Student Experience Center, Suite 350.
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Employee Travel Guide

A Guide for Departments funded by Student-Fees or Institutional Funds

Executive Summary
This travel guide pertains to classified and unclassified employees from the departments listed below that have their payments processed through the Auxiliaries & Activities Business Center (AABC-SEC) finance office in 350 Student Experience Center.

- Associated Students of OSU (ASOSU)
- Childcare and Family Resources (CFR)
- Counseling and Psychological Services (CAPS)
- Diversity and Cultural Engagement (DCE)
- Human Services Resource Center (HSRC)
- Memorial Union (MU)
- Memorial Union Retail Food Services (MURFS)
- Orange Media Network (OMN)
- Recreational Sports
- Student Leadership & Involvement (SLI)
- Student Health Services (SHS)

This guide explains travel in the following four stages:

1) Planning. In this stage, you identify what the event (program, conference, workshop, or competition or retreat) is, who is going and how will you get there? Then, you investigate your options.
2) Arranging. Once your travel is pre-approved and your travel planning /budgeting is complete, you can start the arranging stage. You will work with the AABC-SEC to make arrangements.
3) Traveling. When you leave for your trip, make sure to take your ID, money, and itinerary. During your travel, retain your receipts for reimbursement.
4) Returning. When you return from your trip, submit your receipts with the reimbursement request form within 60 days.

AABC-SEC Travel Team
Travel arrangements are made through the Auxiliaries & Activities Business Center (AABC) Student Experience Center (SEC) finance office in the Student Experience Center, Suite 350. There is a new primary email address for requesting assistance with your travel needs at AABC.SECTravel@oregonstate.edu. The Travel team will be notified whenever an email is sent to the address. The AABC-SEC Travel Team may be contacted at any stage for assistance and will work with you to ensure that all reservations and travel related payments are made according to university policy and in a timely manner for your travel needs.

<table>
<thead>
<tr>
<th>Travel Team</th>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>LaRae Wallace</td>
<td>541-737-6340</td>
<td><a href="mailto:AABC.SECTravel@oregonstate.edu">AABC.SECTravel@oregonstate.edu</a></td>
</tr>
<tr>
<td>Contact</td>
<td>Meghan Tompkins</td>
<td>541-737-2257</td>
<td><a href="mailto:AABC.SECTravel@oregonstate.edu">AABC.SECTravel@oregonstate.edu</a></td>
</tr>
<tr>
<td>Contact</td>
<td>Curt Black</td>
<td>541-737-6260</td>
<td><a href="mailto:AABC.SECTravel@oregonstate.edu">AABC.SECTravel@oregonstate.edu</a></td>
</tr>
<tr>
<td>Contact</td>
<td>Kristal Fehring</td>
<td>541-737-6353</td>
<td><a href="mailto:AABC.SECTravel@oregonstate.edu">AABC.SECTravel@oregonstate.edu</a></td>
</tr>
</tbody>
</table>

Travel forms are available on the AABC-SEC website and here are links to applicable travel policies. Please refer to the Student Travel Guide for information regarding student travel.

<table>
<thead>
<tr>
<th>Website title</th>
<th>Website address</th>
<th>Forms available</th>
</tr>
</thead>
<tbody>
<tr>
<td>AABC-SEC website</td>
<td><a href="http://fa.oregonstate.edu/aabc">http://fa.oregonstate.edu/aabc</a></td>
<td>Itemized Receipt Affidavit, Travel Reimbursement Request</td>
</tr>
</tbody>
</table>
Travel Stages

1) Planning

Pre-approval is required from your budget authority or supervisor. **Please do not make any reservations during the planning phase.**

Six Travel Elements

To ensure that all trip details are clearly planned and meet your budget, please consider the following travel elements:

1. **Who** will attend? Who is your group’s contact person for this trip?
2. **What** event are you attending?
3. **When** is the event held? When will you depart? When will you return?
4. **Where** is the event held? If your travel lasts more than one day, where will you stay overnight?
5. **Why** are you attending this event?
6. **How** will you travel to/from the event?

Investigating Travel Options

While you plan for the six travel elements above, please consider the costs and track your travel budget to ensure that your trip can be afforded. The **Professional Development Pre-Approval form** is designed for creating a comprehensive picture of your trip's six travel elements, as well as providing preapproval of the travel expenses. The following ground transportation, airfare and lodging sections provide suggested travel options. You may also contact the AABC-SEC Travel for travel planning assistance and a completion of the pre-approval form.

When planning your travel, please consider these **three keys for successful travel:**

1. **Safety.** Use safe transportation and, if staying overnight, stay at a hotel located in a safe area.
2. **Efficiency.** Take a direct route to your destination and stay at a hotel close to the event location.
3. **Economy.** Secure the most economical travel accommodations by planning as soon as possible and investigating your options to ensure reasonable prices and availability.

You should plan your trip **as far in advance as possible** to secure the following benefits:

1. **Reasonable prices**
   - Events that require registration (e.g. conferences) usually offer an “early bird” discounted rate if you register early.
• Since airfare is highly subject to change, early planning can save your organization hundreds of dollars per traveler on flight costs.

2. More available options
   • Hotels and airfare options are usually very limited if you start your search near the event date.
   • For events that require registration, you may find that the event is full if you delay registering.

3. Smoother processing
   • Planning your trip far in advance allows for prepayment of expenses when possible. Prepaying for items reduces your out-of-pocket expenses and eliminates the need to submit receipts for reimbursement.

**Event Registration**
For events that require a registration fee, you can usually obtain registration prices and deadlines on the event’s website. Some conferences will offer an **early discounted registration rate**, which you are encouraged to pursue.

If a conference offers optional workshops, seminars and networking events that require an additional fee, please consider the cost and whether it is an appropriate business expense. The department cannot pay for personal tours offered by the conference. Additionally, you will not be reimbursed for any meals provided as a part of the conference registration fee.

**Ground Transportation**
Your ground transportation arrangements will depend on whether your trip includes lodging and airfare. Here is an overview of the types of trips:
Travel Type #1 - Event Only

Ground Transportation between OSU and the Event
If you are considering travelling directly from OSU to the event with no airfare included, please ensure the travel distance is reasonably safe and efficient. Here are the transportation options:

- **Motor Pool**
  - You may rent a vehicle at University Motor Pool on the OSU campus. To ensure that vehicles are available, you need to reserve your vehicle as far in advance as possible.
  - **Motor Pool website** (transportation.oregonstate.edu/motorpool) Phone: 541-737-4141
  - Motor Pool provides the following benefits:
    1. The rental car’s cost can be directly charged to your organization’s funds via OSU index. As a result, you do not pay out-of-pocket and no reimbursement is necessary.
    2. Automatic $1 million liability protection
    3. Full loss/damage waiver protection
    4. Roadside assistance
    5. Full selection of vehicle styles and sizes
  - **Note:** Renting a Motor Pool vehicle is usually cheaper than reimbursing private vehicle mileage for day trips longer than **60 miles.**

- **Enterprise Rent-A-Car**
  - **Enterprise website:** www.enterprise.com
  - OSU has a contract with Enterprise Rent-A-Car that provides the following benefits to employees, staff, or students renting a car for OSU business travel:
    1. The rental car’s cost can be directly billed to your organization’s funds via OSU index. As a result, you do not pay the rental cost out-of-pocket. However, you may need to pay the gas out-of-pocket.
    2. For vehicles rented in Oregon and returned to an alternate branch in Oregon, no additional charges will be assessed.
    3. Insurance coverage is included.

- **Train or Bus**
  - You can investigate these travel options using an online search engine or contacting an OSU-contracted travel agency.

- **Personal Car**
  - Although driving a personal car is an option, it should remain a **last resort** for the following reasons:
    - Car insurance and liability is the driver’s responsibility.
    - The driver must wait until after the trip for a mileage reimbursement and cannot receive an advance payment.
    - The car must be in sound working condition for the safety of all passengers.
  - Private vehicle mileage may be determined by odometer readings or a mapping website.
  - The starting point for mileage is your home or your work station, whichever is closer to the destination.
Travel Type #2 – Event and Lodging
For transportation between OSU and the event/lodging, please refer to the options provided in Travel Type 1 in Ground Transportation between OSU and the Event above.

Ground Transportation between Lodging and the Event
If your trip includes lodging, the commute between your lodging location and the event needs to be planned. If your commute is farther than a safe walking distance, you may consider the following options:

- Complimentary Shuttle
  - Events and hotels may provide complimentary shuttle services. First confirm what travel accommodations your event and/or hotel provides and utilize those options when available.

- Taxis and public transportation
  - Search taxi and public transportation options using an online search engine.

- Rental Car
  - For a large group traveling together, a rental car may be an economical and efficient option. Please see above for details for use of Enterprise Rent A Car.
Hotel Lodging
The following order is preferred for securing your lodging:

1. **Determine whether the event registration includes lodging.** Some events will provide lodging as part of registration for the event. If the event registration includes lodging, please use the lodging provided.

2. **Investigate the event-sponsored hotel(s).** Events will usually offer a discounted rate at one or more hotels near the event location. Please reserve your rooms as far in advance as possible to ensure availability.
   a. **Event-sponsored hotel price restrictions:**
      i. You may stay at an event-sponsored hotel using the event-sponsored rate. However, you must submit documentation, such as a conference agenda or web page from the event showing this rate.

3. **Request WSCA lodging from the Azumano travel agency.** OSU holds a contract with the Azumano travel agency, which offers lodging discounts through WSCA (Western States Contracting Alliance). If you contact the [Azumano travel agency](http://fa.oregonstate.edu/business-affairs/travel) and request WSCA lodging, an Azumano agent can provide discounted lodging options near the event location:

<table>
<thead>
<tr>
<th>Azumano Travel Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local area number:</td>
</tr>
<tr>
<td>Email address:</td>
</tr>
</tbody>
</table>

   a. **Note:** A [credit card](http://fa.oregonstate.edu/aabc/sec-finance/travelrelocation) is required to book WSCA lodging through Azumano. Please use a personal credit card and request reimbursement after the trip within 60 days. For reimbursement information, please refer to the section 4 **Returning**.

4. **Search for hotels near the event location.** If the event registration does not provide lodging, the event-sponsored hotel is unavailable, or a WSCA rate is unavailable, your last resort is to search hotel options online.
   a. **Lodging price restrictions:**
      i. For Oregon and most out-of-state cities, you are limited to $128 per night per person (effective January 1, 2016).
      ii. For certain high-cost cities, please check the following web site for the applicable rate: [http://fa.oregonstate.edu/business-affairs/travel](http://fa.oregonstate.edu/business-affairs/travel) under Travel Rates
      iii. **Exception:** If the hotel-sponsored rate is higher than the $128 rate or applicable rate for high-cost cities, your hotel price limit can be the hotel-sponsored rate if you provide documentation of the event-sponsored hotel price as stated above.
b. **Hotel search suggestions:**

i. **Suggested hotel search sites:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Web Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Hotel Finder</td>
<td><a href="http://www.google.com/hotelfinder/">www.google.com/hotelfinder/</a></td>
</tr>
<tr>
<td>Expedia</td>
<td><a href="http://www.expedia.com/Hotels">www.expedia.com/Hotels</a></td>
</tr>
<tr>
<td>Travelocity</td>
<td><a href="http://www.travelocity.com/Hotels">www.travelocity.com/Hotels</a></td>
</tr>
</tbody>
</table>

ii. Hotel search sites, such as the three listed above, can provide various hotel options based on a single search in your destination’s vicinity.

iii. When viewing the hotel search results, please prioritize hotels nearest the event location that meet your budget and price limitations.

iv. **How to determine the hotels’ proximity to the event location:**

1. The above suggested hotel sites provide a feature that allows you to view the hotel results on a map.

![Figure 1](http://example.com/figure1.png)

*Figure 1: Google Hotel Finder automatically maps your hotel search results*

b. ![Figure 2](http://example.com/figure2.png)

*Figure 2: Using Expedia, click the "View Hotels on a Map" icon in the hotel result page’s left panel to map the hotels.*

c. ![Figure 3](http://example.com/figure3.png)

*Figure 3: Using Travelocity, click the "Map View" tab on the results page to map the hotel results.*

2. In a separate window, you may also need to access a map site, such as Google Maps or MapQuest, to find the event’s location and judge its relative proximity to the mapped hotel results.
v. Some hotels listed in your search results may not be available during the event. To investigate the hotel’s availability, please check the hotel’s website, but do not make a reservation. The reservation process is explained in the **Arranging** Section of the guide.

---

**Hotel Safety**

Hotels that are located in an unsafe area or are not well-maintained should not be considered. The following signs may indicate the hotel is unsafe:

- The price is significantly lower than other options in the area
- The street level view on Google Maps or other mapping website looks uninviting
- Negative customer reviews and/or ratings

---

**Portland Airport Lodging**

If you have an early morning flight leaving from Portland Airport, the department may pay for lodging near the airport for the night prior to the departure date. The **Radisson Hotel Portland Airport** provides the following benefits:

- Room and tax charges billed directly to your department’s index
- Discounted lodging rates
- Free parking near the airport

<table>
<thead>
<tr>
<th>Hotel name</th>
<th>Address</th>
<th>Discounted room rate</th>
<th>Perks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radisson Hotel Portland Airport</td>
<td>6233 NE 78th Ct. Portland, OR 97218</td>
<td>$92.00 plus tax</td>
<td>2 weeks free parking. Direct billing available</td>
</tr>
</tbody>
</table>

**Note:** Other Portland hotels may require a **departmental account or Purchase Request** for direct billing. If your department needs to create an account, please ask the AABC-SEC Travel Team for assistance.

**Air Fare**

Since OSU holds contracts with two local travel agencies, Azumano and Teel’s Travel Planners, the AABC-SEC highly recommends using them for your airfare. These travel agencies provide the **following benefits:**

1. **Airfare can be directly billed** to your department/unit’s funds via an OSU index, which results in more timely and accurate accounting records.
2. **Billing through Azumano or Teel’s Travel Planners is a faster and more efficient process** than your only other option, which is to purchase your airfare and request reimbursement after the trip.
3. **OSU can fully pay** your airfare through Azumano or Teel’s Travel Planners.

However, Azumano and Teel’s Travel Planners also present the **following three caveats:**
1. Online airfare prices may differ from the travel agencies’ prices.
2. Azumano charges a $25 service fee per individual ticket, the service fee is reduced to $22 per person when booking groups of ten or more travelers.
3. Teel’s charges a $32 service fee per individual ticket. The service fee is reduced to $22 per person when booking a group of ten or more travelers.

All airfare purchases are nonrefundable. The cancellation policy varies by airline, but usually a small credit may be obtained for the traveler’s next airfare purchase within one year.

To obtain flight options and prices, you may contact a travel agency using the contact information below. If the agency asks for your travel authorizer, please provide the AABC-SEC Travel Contact’s (Meghan Tompkins).

<table>
<thead>
<tr>
<th></th>
<th>Azumano</th>
<th>Teel’s Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local area number</td>
<td>541-757-9792</td>
<td>541-758-0808</td>
</tr>
<tr>
<td>Email address</td>
<td><a href="mailto:azcorvallis@azumano.com">azcorvallis@azumano.com</a></td>
<td><a href="mailto:travel@travel-planners.com">travel@travel-planners.com</a></td>
</tr>
<tr>
<td>Toll free number</td>
<td>1-800-334-2929</td>
<td>1-800-824-1028</td>
</tr>
<tr>
<td>Fax number</td>
<td>541-758-1631</td>
<td>541-758-0814</td>
</tr>
</tbody>
</table>

International Travel Grants

Pre-approval from OPAA (Office of Post Award Administration) is required when employee international travel expenses will be charged to a grant index. A Travel Authorization form needs to be completed and sent to OPAA in 306 Kerr Admin in advance:

<table>
<thead>
<tr>
<th>Link to OPAA Travel Authorization form:</th>
<th><a href="http://fa.oregonstate.edu/sites/fa.oregonstate.edu/files/Baff/faa/foreigntravelauthorization.pdf">http://fa.oregonstate.edu/sites/fa.oregonstate.edu/files/Baff/faa/foreigntravelauthorization.pdf</a></th>
</tr>
</thead>
</table>
2) Arranging

Before you begin the arranging stage, please complete the following steps:

1. Complete the planning stage and investigate your travel options.
2. Confirm with your budget authority/supervisor that your travel is approved. If you are a budget authority, the only travel expense that you can approve for yourself is the registration fee. Your supervisor needs to approve the rest.

During the arranging stage, your unit/department may prepay your travel arrangements and minimize your out-of-pocket expenses. Here are the four prepayment processes and terminology:

1. The OSU policy manual limits using the Purchasing Card (a.k.a. P-Card, Visa card, Purchasing Card or credit card) to paying event registration fees and lodging only. All other charges must be direct billed, prepaid or reimbursed.
2. For airfare, Enterprise rental car, Portland Airport shuttle, and Portland Airport lodging, direct bill options are available. Direct bill means the charges can be billed directly to your department and paid using your department’s index.
3. For travel expenses that you incur and were not prepaid, you can request reimbursement, but you must wait until after the trip and provide an itemized receipt showing the final charges within 60 days.
4. If you cannot afford to wait until after the trip to receive a reimbursement for your travel expenses that were not prepaid, you may qualify to receive a travel advance if your trip meets certain criteria.

For more information regarding travel advances, please see the Travel Advance section below.

Here is the typical arrangement process for travel accommodations. The arrangement process for your particular trip may differ.

Event Registration

If you are authorized to use a departmental Purchasing Card (P-Card), please follow these steps:

1. Check out your department’s Purchasing Card from your card custodian.
2. Register for the event and use the Purchasing Card to pay the registration fee.
3. Return the Purchasing Card with a receipt and record the transaction in the activity log.

If you are not authorized to use a departmental P-Card, please follow these steps:

1. Complete a registration form.
2. Provide the registration form to an authorized P-Card user (i.e. another staff member) who can register you for the conference.

Motor Pool Rental Car

As explained in the Planning stage, you can directly bill rental car and fuel charges from Motor Pool to an OSU departmental index. To begin the reservation process, you need the departmental index.

Online Reservations—Motor Pool

Follow the instructions below to access the Motor Pool vehicle reservation portal:
1. Access the Motor Pool website: motorpool.oregonstate.edu
2. Click the “Make Reservation” tab and follow the on screen instructions.

Motor Pool Additional Steps
Before renting a Motor Pool vehicle, each driver and backup driver must follow up on these next two steps.

1) For your first reservation through Motor Pool, you need to complete a Driver Authorization form, which you can find by clicking the orange “Driver Authorization form” text on the Motor Pool home page.

2) To rent an 8-12 passenger van, each driver must view a van safety video and complete a van safety test.

Enterprise Rental Car
As explained in the Planning stage, you can directly bill rental car charges from Enterprise Rent-A-Car or National to an OSU departmental index. Enterprise began requiring an OSU account number to direct bill reservations requested over the phone or in-person. To avoid fraudulent reservations, only travel coordinators and frequent OSU business travelers receive the required account number. If you travel at least twice per year on OSU business, you may receive the account number. To request the account number, please contact Jennifer Creighton, AABC-SEC Finance & Accounting Manager, at Jennifer.Creighton@oregonstate.edu.

If you do not have the OSU account number, you may choose from the following three options, which are listed in the most preferred order, to reserve a rental car using direct bill:

1. Request a rental car through the OSU contracted travel agencies, Azumano or Teel’s Travel Planners.
2. Use the OSU online reservation portal.
3. Submit a Purchase Request (PR) to the AABC-SEC Travel Team, who will make the reservation and send you the confirmation number.

Note: If you rent a car during a trip that combines business and personal travel, the department cannot pay for the personal days. Please do not direct bill the rental car during personal days.
Option 1: Reservation through a OSU Contracted Travel Agency
You may ask an Azumano or Teel’s Travel Planners agent to reserve an Enterprise or National car rental. If you reserve your car through a travel agent, please see the table below regarding fees that may apply:

<table>
<thead>
<tr>
<th>Azumano</th>
<th>Teel’s Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>• If you request a rental car with a flight, no additional charge is incurred.</td>
<td>$10.00 fee regardless of when you request a rental car or hotel reservation for non-commissionable companies of the travel agency, <strong>no fee</strong> with companies who pay a commission to the agency</td>
</tr>
<tr>
<td>• If you request a rental car after your flight is ticketed, the agent charges an additional <strong>$7.00 fee</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

For any travel requests (e.g. airfare or rental car) through an Azumano or Teel’s travel agent, please notify the travel agent to send the authorization request to the AABC-SEC Travel Team primary contact (Meghan Tompkins).

Option 2: Online Reservation
Note: The online reservation system only handles reservations using the same pick up and drop off location.

1) Click this link: [myOSU portal](#)
2) Login using your ONID username and login.
3) Click the **Employee** tab near the top of the page:

![myOSU portal](#)

4) Click the **Enterprise Car Rental** link under the “Employee Quick Links” list:

![Employee Quick Links](#)

5) Select **OSU Employees on Business**.
6) Select **Enterprise Rent-a-Car** or **National Car Rental**.
7) Make the appropriate selections for the reservation. Near the end of the process, you will provide the departmental index and activity code.

Option 3: Purchase Request and Business Center Authorization
If the first two options do not suffice, please provide the following information to the AABC-SEC Travel Team, who will request budget authority approval, make the reservation, and send you the confirmation number:
• Pick up date, time and location
• Drop off date, time and location
• Index
• Business purpose
• Please indicate if a vehicle larger than economy size is needed

<table>
<thead>
<tr>
<th>Enterprise location</th>
<th>Phone number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1414 NW 9th St, Corvallis, OR 97330</td>
<td>(541) 758-0000</td>
</tr>
<tr>
<td>520 Ellsworth, SW, Albany, OR 97321</td>
<td>(541) 928-0000</td>
</tr>
</tbody>
</table>

**Shuttle**

The HUT shuttle provides transportation between OSU and the Portland Airport (PDX). This section explains how to bill your shuttle fare directly to your departmental index. If you do not use direct bill for your shuttle, you can receive a reimbursement after the trip instead.

**HUT Shuttle**

Two different methods exist for billing the HUT shuttle directly to your departmental index. Your budget authority or supervisor must preapprove:

1. Request direct bill through a travel agency:
   a. Contact an OSU travel agency, Azumano or Teel’s Travel Planners, and ask the travel agent to add the HUT shuttle to your travel itinerary when you book a flight.

   Note: If you request a shuttle through an Azumano or Teel’s travel agent, the following fees may apply:

<table>
<thead>
<tr>
<th>Azumano</th>
<th>Teel’s Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$5.00 fee</strong> for shuttle reservations with direct billing</td>
<td><strong>$15.00 fee</strong> for shuttle reservations with direct billing</td>
</tr>
</tbody>
</table>

2. Request direct bill through the HUT shuttle company:
   a. Call the Corvallis HUT shuttle office: (541) 926-2525.
   b. State you are an OSU employee and would like the shuttle direct billed to your department and provide the following information:
      i. Your department’s name and contact information
      ii. Departure date, time, and pick up location
      iii. Return date, time, and drop off location
Hotel Lodging

Airport Lodging
The Portland hotels listed in the Portland Airport Lodging section above provide direct billing for OSU reservations.

Note: The hotel may require a departmental account or Purchase Request for direct billing. If your department needs to create an account, please ask the AABC-SEC Travel Team for assistance.

Option 1: OSU Travel Agency
1. You or the OSU candidate would ask the travel agent to add a Portland hotel to the travel itinerary when requesting a flight through an OSU travel agency, Azumano or Teel’s Travel Planners.
2. The following fees may apply to lodging direct billed through the travel agency:

<table>
<thead>
<tr>
<th>Azumano</th>
<th>Teel’s Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>• If you request a Portland hotel reservation with a flight, no additional charge is incurred.</td>
<td>$10.00 fee regardless of when you request a hotel reservation for non-commissionable companies of the travel agency, no fee with companies who pay a commission to the agency</td>
</tr>
<tr>
<td>• If you request a Portland hotel reservation after your flight is ticketed, the agent charges an additional $7.00 fee.</td>
<td></td>
</tr>
</tbody>
</table>

Option 2: Contact the Portland Hotel
1. Call the Portland hotel where you want to place the reservation:

<table>
<thead>
<tr>
<th>Hotel name</th>
<th>Address</th>
<th>Phone number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radisson Hotel Portland Airport</td>
<td>6233 NE 78th Ct. Portland, OR 97218</td>
<td>503-251-2000</td>
</tr>
</tbody>
</table>

2. Mention you are an OSU employee and would like the hotel reservation billed to your department. You will need to provide the following information:
   a. Your department’s name and contact information
   b. Check-in date
   c. Check-out date

Purchasing Card (P-Card)
The P-Card may be used for employee or staff lodging room and tax. You may use the departmental P-Card for conference lodging only if the following four criteria are met:

1) The purchase is for conference lodging room and tax only during business days.
2) The conference hotel information and schedule is submitted to the AABC-SEC.
3) The reservation’s room rate matches the lodging rates advertised by the conference.
4) The room is not shared with attendees from another institution.
After reserving the room, please call the hotel and ask for a **credit card authorization form** because the authorization form allows you to authorize the lodging charges without bringing the P-Card. On the authorization form, you would authorize **room and tax only** because the department cannot pay for incidental charges.

If you do not use the P-Card for lodging, there are other payment options listed below.

**Other Payment Options**
The following payment options are also available for for lodging during a conference or other event types:

- If you send your reservation confirmation and travel information to the AABC-SEC Travel Primary Contact (AABC.SECTravel@oregonstate.edu), the AABC-SEC can arrange for a **check to prepay** your reservation. To ensure that a prepayment can be processed, please send your confirmation at least four weeks in advance.
- If your lodging was not prepaid, you may request **reimbursement** for your room and tax expenses after your trip. (Please see the **Returning** section below for more information).
- If your reservation cannot be prepaid and you cannot afford to wait until after the trip to receive a reimbursement, you may request a **travel advance** to pay your lodging if your trip meets the qualifying criteria. (Please see the **Travel Advance** section below for more information).

**Shared Room**
The room cost will be less per person if you share a room with other staff or students attending the event. The hotel usually requires only one credit card to hold the room. However, you may each pay your share of the room at check out and request a **receipt that separates** the amount you paid from the other person’s payment. To receive reimbursement, submit the receipt after the trip.

If the receipt does **not** distinguish your payment from the other person’s payment, please submit the receipt and your **debit/credit statement** showing the hotel charge to receive reimbursement. The AABC-SEC will make sure all confidential information is blacked out.

If you share a room with staff or students from another department or institution, please note:

- **OSU cannot** pay for students or staff from **another institution**. You must split payments when you check out of the hotel and obtain an itemized receipt for your payment.
- If you share a room with students or staff from **another OSU department**, splitting payments at check out is recommended. If one person pays the full bill, the person’s reimbursement will require budget authority approval from both departments.
Hotel Room Capacity
Please adhere to the hotel’s room capacity when requesting lodging.

Incidental Expenses Deposit
Most hotels bill incidental expenses (e.g., movies and food) after you purchase them. However, some hotels may require an incidental fee deposit prior to checking into the hotel. Since OSU does not pay incidental expenses, you will need to provide your personal debit/credit card or money for any incidental fee deposits or expenses. These fees have been found to be as high as $100.00 per night at some hotels.

Airfare
Since airfare prices significantly increase as the flight departure date nears, you are encouraged to begin the airfare arranging process as soon as possible. You will need to act promptly with airfare arrangements because prices can change by the hour.

Three steps are needed to complete the airfare arrangement process:

1. Contact an OSU-contracted travel agency, Azumano or Teel’s Travel.
   a. To request a flight, you provide the travel agent your destination and departure/return dates and times. While requesting the flight, you may ask the travel agent to add a rental car or airport shuttle.
   b. The following personal information is required for each traveler:
      i. Full name as shown on ID
      ii. Gender
      iii. Date of birth
      iv. Phone number
      v. Travel authorizer (please provide the primary contact’s name from the AABC-SEC Travel Contact list on page 3)
      vi. (Optional) Seat preference and frequent flyer number

2. Your budget authority sends a message to the AABC-SEC Travel Team approving your requested airfare.

3. The AABC-SEC Travel Team authorizes your requested flight with Azumano or Teel’s Travel Planners.

Since airfare prices are highly subject to change, your budget authority’s timely response is needed to approve your airfare at the current price. To ensure that your budget authority approves your flight at the current price, the AABC-SEC recommends the following two options:

1. To speed up the booking process, the budget authority may approve your flight before receiving the flight quote. After booking the flight, the AABC-SEC Travel Team will provide the final airfare cost to
the budget authority. For this approval method, the budget authority needs to provide the following information to the AABC-SEC Travel Team in advance:

a. Traveler’s name
b. Index to be billed
c. Destination
d. Business purpose (e.g. event name)
e. Departure date
f. Return date
g. Optional: any parameters for approval (e.g. a limit on price)

2. If your budget authority prefers to **approve your flight after receiving the flight quote**, please notify your budget authority in advance when you will call the travel agent. Providing advance notice will alert your budget authority when to expect the flight approval request and ensure they are available during the time frame needed to approve.
Business combined with Personal Travel

For any personal travel included on a business trip, you must pay any costs resulting from any personal days. OSU can only pay for the business expenses involved with your trip. To facilitate payment for your business expenses, you should separate your receipts and reservations related to business travel from your personal travel.

Please do not Personally Book your Flight

The AABC-SEC recommends using OSU’s contracted travel agencies to book your airfare for the reasons provided on page 10. If you book your flight using a personal card, you will encounter the following two drawbacks:

1. You must wait until after you return from the trip to receive a flight reimbursement.
2. To receive a reimbursement, you must provide a receipt from the vendor within 60 days of the trip end date.
   a. A credit/debit card statement with the charge highlighted is also needed if the airfare receipt does not show proof of payment.
Airfare for Business combined with Personal Travel
You may add personal travel to your business itinerary, but the personal travel portion is your expense. OSU can only pay for the business portion of the airfare. If you decide that you would like to add personal travel to your flight itinerary, please request these two different itineraries from the travel agent:

1. An itinerary that includes both your business travel and personal travel
2. An itinerary that includes business travel only

You need to provide both itineraries to the AABC-SEC Travel Team before your flight can be authorized.

Payment Process for Airfare combining Business and Personal Travel:
You have two different options for paying the airfare that includes your personal travel:

- **Option 1:** The travel agent can charge the business travel cost, which is the price of the itinerary that includes business travel only, to your unit/departmental index. The travel agent charges the remaining cost to your personal credit/debit card. Both the unit/department and your personal credit/debit card incur a processing fee.
  - If you choose this option, you must arrange your flight through Azumano or Teel's Travel Planners.
- **Option 2:** You can pay for the full airfare price and receive reimbursement after your trip up to the business travel cost, which is the price of the itinerary that includes business travel only.
  - If you choose this option, you can arrange your flight through any airfare vendor. However, you need to submit the receipt and itinerary with your travel reimbursement documents as described in the “Please do not personally book your flight” box on the previous page. The submission deadline is 60 days from the trip end date.

**Travel Advance**
OSU prefers that you seek reimbursement after your trip rather than requesting a travel advance because it creates a credit risk to the university. If all options have been exhausted and reimbursement is not feasible for you, you may qualify for a travel advance if your trip meets the following criteria:

- You are an OSU classified or unclassified employee with at least .5 FTE or a graduate assistant with .49 FTE
- All previous travel advances have been settled in full
- Budget authority authorizes your travel
- Minimum of $250.00 that cannot be prepaid for by other means
- The travel is:
  - Out of state or international travel that is six or more days, or
  - In-state travel that is 16 or more days.

If you meet the criteria for a travel advance, you may request a travel advance by sending the following information to the primary AABC-SEC Travel Team:

- Destination
- Travel dates
- Attendees
- Index to be charged
- Event itinerary
- Expenses to cover using the travel advance
- Reservation confirmations or documented pricing information for expenses

After receiving the above information, the AABC-SEC Travel Team prepares a **travel advance form** for you and your budget authority to sign. The signed form needs to be returned at least **five business days** prior to the date that the advance is needed. You will receive the form as either a direct deposit or a check pick up at Kerr Admin Building.

After the trip ends, you must submit itemized receipts for your expenses within **45 days** to the AABC-SEC Travel Team, who will reconcile the expenses and determine the amount owed or reimbursed.
3) Traveling
Before you leave, remember to bring these important items:

- Personal identification
- Airline travel itinerary
- Lodging reservation confirmations
- Money

Also, read the following sections to determine receipts and other items you must retain while you travel.

Expenses that might require a receipt for reimbursement
Depending on your department’s policy, you may need to provide receipts for the following:

- Personal meals
- Gasoline

Please ask your department to confirm whether you need to keep personal meal receipts and/or gas receipts.

Meal Amounts
Your meal reimbursements are limited to the below amounts (effective January 1, 2016):

<table>
<thead>
<tr>
<th>Rate</th>
<th>Regular Per Diem</th>
<th>High Per Diem</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicable Locations:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most U.S. locations</td>
<td>$14.25 per person</td>
<td>$17.00 per person</td>
</tr>
<tr>
<td>High cost localities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>listed on Oregon</td>
<td></td>
<td></td>
</tr>
<tr>
<td>University System</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(OUS) website*</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*The list of high cost localities can be found at http://fa.oregonstate.edu/business-affairs/travel

You will not be reimbursed for:

- Provided meals
- Alcohol
- Tips and gratuities, except for per diem and group meals

Meal Receipts
If your department/organization requires receipts for reimbursement, the receipts need to list each item that you purchased. If the venue cannot provide an original itemized receipt, you need to complete an Itemized Receipt Affidavit.

Meals on One Day Trip (no overnight stay)
If you depart and return on the same day for travel, meal allowances are reimbursed using the following restrictions:

<table>
<thead>
<tr>
<th>Meal</th>
<th>OSU Policy for a One Day Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>Breakfast allowance is taxable and can be paid when an employee leaves their official</td>
</tr>
</tbody>
</table>
Meals away from the work location

<table>
<thead>
<tr>
<th>Meals away from the work location</th>
<th>The meal can only be reimbursed when <strong>all three of the following</strong> are met:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. The claimant is attending a conference, seminar, convention, board meeting, or committee meeting as a representative of Oregon State University where non-OSU employees are present.</td>
</tr>
<tr>
<td></td>
<td>2. The meeting is not a social or fundraising function.</td>
</tr>
<tr>
<td></td>
<td>3. The menu and cost is arranged by the event organizers and beyond the control of the claimant.</td>
</tr>
<tr>
<td></td>
<td>These meals are considered an employee working meal and are <strong>not taxable</strong> to the employee. Proof of payment and a copy of the meeting announcement which shows a clear business purpose and the meal as part of the agenda are required. Alcoholic beverages cannot be reimbursed.</td>
</tr>
</tbody>
</table>

Dinner

| Dinner | Dinner allowance is **taxable** and can be paid when an employee returns to their official station **two or more hours after** their regular work shift. |


Note: You do not receive reimbursement for a meal provided at the conference or event.

**Expenses that require a receipt for reimbursement**

The following expenses are reimbursable if you submit the **original receipt**:

- Parking
- Commercial ground transportation (e.g. bus, subway, shuttle, taxi, tolls) over $75.00
- Car Rental
- Gas for rental car
- Airline Baggage Fees over $25.00
- Group meals for OSU attendees or guests
- Lodging room and tax, if you paid for it
- Airfare, if you paid for it (See above section “Please do not personally book your flight” for required documentation)
- Conference registration, if you paid for it
- Miscellaneous expenses over $25.00

**Group Meals**

Group meals are those where you pay for another traveler’s meal. For group meals, you need to specify **whom in your group** you purchased meals for.

Whereas personal meal receipts might be needed depending on your department, **group meal receipts are always required**.

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**Auxiliaries & Activities Business Center (AABC), Finance**

Oregon State University, Student Experience Center, Suite 350, 2251 SW Jefferson Way, Corvallis, Oregon 97331

Phone: 541-737-7770 | Fax: 541-737-3114 | [http://fa.oregonstate.edu/aabc/sec-finance/travelrelocation](http://fa.oregonstate.edu/aabc/sec-finance/travelrelocation) | Email: AABC_SECTravel@oregonstate.edu
A tip is allowable for group meals up to 15%. The meal cost plus tip must not exceed the per diem amount per person. Please refer to the previous “Meal Receipts” and “Meal Amounts” for receipt requirements and per diem amounts.

Incidental Expenses (not reimbursable)
You will not be reimbursed for incidental expenses, which include, but are not limited to expenses for:

- Laundry
- Cleaning and pressing of clothing
- Gratuities and tips
- Meals provided
- Entertainment
- Alcohol
- Souvenirs
- Room service

A complete list of Travel Non-Reimbursable Expenses can be found at: [http://fa.oregonstate.edu/fis-manual/400-expenditures/411-travel/411-09-non-reimbursable-expenses](http://fa.oregonstate.edu/fis-manual/400-expenditures/411-travel/411-09-non-reimbursable-expenses)

Prepaid Expenses
As the traveler, you will typically receive the receipts for prepaid expenses, such as lodging and Enterprise rental car. Please submit receipts for all prepaid expenses within one week of your return date to the AABC-SEC Travel Team.
4) Returning

Within 60 days of your travel return date, you may request reimbursement for travel expenses. However, if you return from travel in May or June, you have less than 60 days to request reimbursement before the fiscal year end on June 30th. If you need additional time to request reimbursement, please contact the AABC-SEC Travel Team as soon as possible because the business center has limited time to process the payment after June 30th.

Please refer to the Travel Reimbursement Request on Page 23 for information regarding reimbursement receipts and requirements. For all travel reimbursements, the following items are needed:

1) Original receipts
2) Event agenda/itinerary
3) Travel Reimbursement Form (please refer to the next section)
4) Attendance list (for group travel only)

Travel Reimbursement Form
To ensure that the AABC-SEC Travel Team receives all the information needed to prepare the reimbursement, submit a Travel Reimbursement Request Form to the AABC-SEC Travel Team, along with all pertinent receipts. The form can be found on the AABC website and a link can be found on page 4. See the AABC Reimbursement document for further instructions on travel reimbursement.

There are two options for completing a Travel Reimbursement Form:

1) Send an email or document containing your travel and expense information, or use an AABC-SEC travel envelope packet.
2) Use the Travel Reimbursement Entry System (TRES).