

COLLEGE OF HEALTH SCIENCES

OVERNIGHT TRAVEL WORKFLOW

EMPLOYEE

Prior to Travel:

1. Department Administrative Assistant (AA) completes a Travel Authorization form.

- Include source of funding and robust business purpose and employee & supervisor signatures
- Send Travel Authorization form to CHS-BUSINESS-ORDERS@uky.edu and CC Financial Analyst

2. Financial Analyst takes information and creates a Trip Number using the travel database.

- Shares Trip Number with Department Administrative Assistant
- Financial Analyst will contact the Administrative Assistant to clarify any questions*

3. Financial Analyst, Administrative Assistant, and Traveler coordinate to arrange:

- Event registration
- Flight
- Rental car/personal car information
- Lodging
- Notes on trip (special situations)

If completed by traveler or AA - receipts must be submitted through CHS-Business-Orders@uky.edu with Trip Number referenced.

Upon Return:

4. Department Administrative Assistant completes a Travel Reimbursement form.

- AA fills out a CHS Request for Travel Reimbursement form
- AA makes notes on any deviation in travel plans
- AA submits receipts and CHS Request for Travel Reimbursement form to CHS-BUSINESS-ORDERS@uky.edu and CC Financial Analyst

Financial Analyst will contact the Department AA to clarify any questions

5. Financial Analyst enters travel information *into Concur* in the travelers profile.

- Upon completion, Financial Analyst submits the Concur travel documents to traveler for approval (via Concur)
- Traveler will review for accuracy. If approved, the form is routed to their supervisor for approval (via Concur)
If not approved, traveler will coordinate with the Financial Analyst to revise.
- Supervisor will review for accuracy. If approved, the form is routed to the CHS Business Officer for approval (via Concur)
If not approved, supervisor will coordinate with the Traveler & Financial Analyst to revise.
- CHS Business Office will review for accuracy. If approved, the form is routed to UK Accounts Payable for reimbursement (thru Concur)

If not approved, Business Officer will coordinate with the Traveler & Financial Analyst to revise.

STUDENT

What is the funding source that is paying for the trip?

- If the funding is block funding or a student travel award then they must travel as a student.
- If the funding is grant related then the travel is typically as an employee. *See Employee travel.*

Is it related to the students own project or faculty member project?

- If it's the students project then they will typically travel as a student.
- If it's the faculty's project then they will typically travel as an employee. *See Employee travel.*

Post-Doctoral Scholar?

- Typically considered as an Employee. *See Employee travel.*

Post-Doctoral Fellowship?

- Typically funded by a Training Grant and considered as a student.

Prior to Travel:

1. Department Administrative Assistant (AA) submits a CHS online order form and attaches a Payment on Behalf of Student form.

- If expenses are to be paid by UK procard, no additional steps are required prior to submission of online order form.
- If the expense(s) were paid by student's personal funds, itemized receipts showing amount and form of payment must be submitted. Include a special note that we are to reimburse prior to travel due to financial hardship to the student.

2. Financial Analyst reviews and approves order.

- Financial Analyst notifies the Department AA the order has been approved
- If not approved, Financial Analyst will contact the Department AA to clarify any questions*

3. Financial Analyst, Department AA, and student coordinate to arrange.

- Event registration
 - Flight
 - Rental car/personal car information
 - Lodging
 - Notes on trip (special situations)
- If completed by traveler or AA - receipts must be attached to the online order or submitted through CHS-Business-Orders@uky.edu with order number referenced.*
- Student per diem is based on itemized receipts (no alcohol)*

4. Student submits receipts to AA within two weeks of travel.

- AA submits a CHS online order form and attaches a Payment on Behalf of Student form
- For expenses paid by student's personal funds, itemized receipts showing amount and form of payment must be submitted.

Financial Analyst will contact the Department AA to clarify any questions

5. Financial Analyst creates and submits PRD for approval.

- CHS Business Office will review for accuracy. If approved, the form is routed to UK Accounts Payable for reimbursement (thru Concur)

If not approved, Business Officer will coordinate with the Traveler & Financial Analyst to revise.

- Once approved, it routes to UK Accounts Payable for processing
- UK Accounts Payable will review and approve with payment sent to student via check

If rejected, an automated email will inform the Financial Analyst. Issues will be resolved and a new PRD will be submitted.