

STEP 1!

Fill out, submit, and wait for a signed (approved)

[IB Essential Travel Approval Form](#)

to be returned to you.

Upon receipt of your approved and signed copy via DocuSign, please proceed.

STEP 2

Fill out and submit the [IB Pre-Travel](#) Form prior to incurring travel expense. This ensures reimbursement eligibility for reimbursable expenses and expedites the processing of your reimbursement.

STEP 3

Fill out and submit the [IB Request for Travel Reimbursement](#) form ASAP upon your return. Reimbursements requests submitted later than 60 days from your return may be denied payment

IB PRE-TRAVEL FORM GUIDE

Name of Traveler: When more than one person will be traveling on the same funding and itinerary, all names may be included on a single Pre-Travel Form. However, all travelers must submit separate requests for reimbursement.

Principal Investigator Approval: A PI may authorize charges to the index for travelers other than themselves via email or digital signature.

Destination: List the destination you will be visiting for business purposes first. If you will also be taking any time during your trip for personal travel, please list those dates subsequently in this section. Personal travel expenses are not reimbursable.

Purpose of Travel: This should be a brief explanation of your reason for traveling (may mirror your Essential Travel Form). For conference travel, please include a link to the conference website if possible.

Estimates Travel Costs: Please provide estimate for all expected expenses, use the check boxes to designate how the expense will be paid. A check in the Dept. column means the department will be pre-paying for that expense. A check in the traveler column means that you will be paying out of pocket and requesting reimbursement on return.

Index: Please indicate the index that will be used to pay for travel expenses. You can include a second index in the field to the right of the primary index. If you will be using more than one index, please include an explanation of how your like expenses split between the two.

Do you need help with your expenses?

OSU has contracts with travel vendors who will bill the Department directly to save you out-of-pocket expenses. Expenses eligible for direct bill include airfare, airport shuttle transport, car rental, conference registration, and some lodging expenses. If you would like to request direct billing for some of your expenses (direct billing is never available for per diem expenses), please contact Tresa in the IB Office for assistance; bowlinst@oregonstate.edu or (541) 737-3705. We highly recommend making all arrangements for air travel through Tresa.

DO NOT use the departmental credit for travel expenses without prior approval from Tresa or the IB Office, if you do not have approval, you may be asked to reimburse the department for a portion or all expenses you charge to the card.

Please note that no direct bill expenses will be authorized by the department without an approved Essential Travel Form and an IB Pre-Travel Form.

Special note regarding airport shuttles: direct bill shuttle transportation can only be booked by contacting Tresa in the IB office via phone or email. If you would like for your shuttle out-of-pocket and be reimbursed, the PDX shuttle is [Groome Transportation](#) and the Eugene airport shuttle is [HUB airport shuttle](#).

International Travel – CONTACT TRESA AT bowlinst@oregonstate.edu PRIOR TO MAKING ANY INTERNATIONAL TRAVEL PLANS

Prior to any international travel, the following steps MUST be completed in addition to all other required pre-travel steps.

1. Complete your [International Travel Registration](#). This assures that you will have coverage under the Travel Accident & Sickness plan while you are out of the country. This insurance is required for all time spent out of the country on business.
 - a. You can register for yourself or, if you have turned in the Pre-Travel form, the IB Office can register on your behalf
 - b. To request coverage for personal travel preceding/following/during business travel or for non-business dependents, [click here](#).
2. IF YOU ARE USING GRANT FUNDS FOR ANY PORTION OF YOUR TRAVEL EXPENSES:
 - a. You must also submit the [Foreign Travel Authorization Form](#) to Tresa or the IB Office.
 - i. Failure to do so with adequate time to obtain OSRAA approval prior to departure may result in personal liability for all expenses.
 - ii. If you have any doubt whether your travel requires this form, please verify with the IB Office.
 - b. Travel using grant funds requires adherence to the [Fly America Act](#).
 - i. There are some exceptions to this requirement, [click here](#) to verify if your travel qualifies and request a waiver.
3. Please review the [Risk Management International Travel](#) page for further information and helpful links.

REQUEST FOR REIMBURSEMENT FORM GUIDE

Travel reimbursement claims are to be submitted within 60 days of return. Please note: expenses paid out-of-pocket cannot be reimbursed until travel is complete.

Appropriate receipts and documentation are required.

Documentation ALWAYS required:

- Lodging receipt(s) – must show the nightly room rate separately from taxes and any other expenses, the method of payment, and a zero balance
- Fuel receipt(s)
- Supplies receipt(s)
- Ground transportation receipt(s)
- Airfare receipt(s) – MUST include complete itinerary and proof of payment
- Conference registration receipt(s) – whenever possible, please use the department credit card to purchase conference registration, contact Tresa; bowlinst@oregonstate.edu for assistance.
- Parking receipt(s)
- Receipt(s) for any meals that you host (any time you pay for somebody else's meal in addition to your own)
 - Alcohol is NOT reimbursable, please request to have a separate receipt for alcohol
 - OSU will only reimburse for tips up to 15%

To ensure efficient and speedy reimbursement, please keep all of your receipts. If in doubt, ask Tresa or consult the OSU Fiscal Policy Manual.

Important Per Diem Reimbursement Information

Partial Day Per Diem Rates

(involving an overnight stay, per diem reimbursed without an overnight stay is taxable)

Initial Day of Travel – Leave	Prior to 7:00 AM	7:00 AM to 12:59 PM	1:00 PM or after
Meal Allowance	Breakfast, Lunch, Dinner	Lunch, Dinner	Dinner
Final Day of Travel – Return	Prior to Noon	12:00 PM to 5:59 PM	6:00 PM and after
Meal Allowance	Breakfast	Breakfast, Lunch	Breakfast, Lunch, Dinner

Please click [HERE](#) for current US per diem rates by State & City, including Puerto Rico and US possessions.

Please click [HERE](#) for current foreign per diem rates of contact Tresa in the IB Department Office.

Click [HERE](#) to fill out your Essential Travel Approval Form.

Click [HERE](#) to fill out your IB Pre-Travel Form.

Click [HERE](#) to fill out your request for Travel Reimbursement.

To use the 'SUBMIT' button embedded in each form, please open the form in Acrobat.

Otherwise, please save as a PDF and send to bowlinst@oregonstate.edu.

Your primary contact for all travel questions, concerns, needs, etc. is Tresa in the IB Office; bowlinst@oregonstate.edu, (541) 737-3705.

For further information, please consult the [DSU Travel Policy Manual](#).