

# New Coordinator Training

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PREPARING FOR TRAVEL

# Introduction

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Create new Travel Authorization

TA Authorization Signature Approvals

Complete Travel Arrangements

# Introduction

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Cancel or postpone a trip

Get receipts from traveler

Prepare Expense Report

# Abbreviations & Terms used in this document

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Expense Report – (ER)

Travel Services (TS)– the office that processes all travel related expenses – contacts can be found on TRAVEL webpage.

OMEGA /CONCUR – travel agent/travel reservation system required for making travel arrangements can be found under TRAVEL RESERVATIONS of TRAVEL webpage.

# JList Requirements

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Traveler must be active in JList

Visitors are added when they register in JRIS.

Employees are added by HR upon being hired.

Inquires about Jlist?

- Contact Sue Ewing (ext 7687)
- Send email to [iris@jlab.org](mailto:iris@jlab.org)

# Travel Authorization Creation

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How to Access the Travel Authorization System

Open a web browser

Go to the Jefferson Lab Travel Services home page

Select Travel Authorization System or enter  
<https://mis.jlab.org/mis/apps/travel/>

At the TA's menu

Enter a new authorization

# How to create a Travel Authorization

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Verify the traveler's name. The system user currently signed on to the terminal will have their name displayed in this space automatically.

To change the traveler's name, click CHANGE.

Enter the traveler's last name or up to 3 letters of the last name and hit TAB.

Allow a few seconds for the names to be loaded.

# How to create a Travel Authorization

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Then click on the drop-down menu arrow.

All names meeting the above criteria will be displayed.

Click on the desired name. The selected name will automatically replace the previously displayed traveler's name

# How to create a Travel Authorization

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Project/Org/Account(POA)

From the drop-down menus, select a project, an organization, and an account.

Click ADD POA.

If there are multiple POAs, repeat the above step for all POAs.

To delete a POA, click REMOVE.

# SUBMIT TA TO TRAVEL

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Complete TA and click SUBMIT

Authorized Proj/Org, supervisor and traveler notified 'TA awaiting approval is in their queue'

Once approved – TA sent to TS for review and release

Once released– status changes to SUBMITTED

You (as preparer) receive notification

You can now commit funds and make travel arrangements.

# MAKE TRAVEL ARRANGEMENTS

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Contact Omega World Wide: ([vabeach@owt.net](mailto:vabeach@owt.net))

or through CONCUR ([concurolutions.com](http://concurolutions.com))

- “Purchase” ticket
- Reserve a hotel (outside Newport News)
- Reserve a rental car

If any problems with reservations contact Travel Services: [travels@jlab.org](mailto:travels@jlab.org)

# CANCELLED TRIP

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Contact Omega World Wide to cancel 1-888-527-1279 or vabeach@owt.net

- Airline ticket, rental car and hotel
- Cancel Hotel reservations-if not booked with Omega then contact Hotel directly.
- Cancel Car Rental reservation-if not booked with Omega then contact Car Rental directly.

If a registration fee paid see if can be reimbursed, used later or by another traveler

# CANCELLED TRIP

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Update the TA—Remove costs that have not been incurred (rental car, per diem, lodging) In notes section show:

- Add date airline ticket expires (1 yr. from issue date)
- Save TA

If there are no costs incurred on

- Submitted trip (contact TS to archive)

# POSTPONED TRIP

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Contact Omega World Wide to change airline ticket and other arrangements.

- Hotel reservation-if not done by OMEGA then contact hotel directly

Update TA with new dates of travel

Make a note on TA of why trip dates changed

Re-Submit TA for approval again.

# Preparing Expense Report

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## Domestic or Foreign trip

- Foreign, convert currency to USD using [www.oanda.com](http://www.oanda.com)
- Verify per diem rates. Foreign rates may change monthly.

## Drive vs. Fly

- Cost comparison needed if driving more than 300 miles one way

## JLab or Traveler paid expenses

- Prepaid by JLab (JLab staff – mandatory; visitors – recommended):
  - Airline tickets – cost comparison if purchased by visitor business only itinerary should be attached to TA
  - Registration fees – amt. on TA must be equal to or more than actual

# Receipts are required for

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## Airline ticket

- Copy of Invoice/Itinerary from Omega World Travel
- Cost comparison if self purchased ticket (visitors only)

## Registration Fee

- Email Confirmation of registration w/fee amount paid
- Written or prepared receipt from event

## Car Rental

- Original receipt presented to renter when car returned
- Receipt received via email from rental agency

## Lodging

- Original itemized receipt given to guest at check out
- Email hotel confirmation stating room cost + taxes and stating no other expenses are included.

## Other expenses \$75 or more

- Original receipts, a copy must be accompanied by signed missing receipt form

# Reporting EXPENSES – HEADER

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Use electronic Expense Report (ER) which can be found on TA click

All traveler information **Expense Report**

Fill in each column with the amounts for each expense if any explanations needed please add note to each field

Note: If lodging is direct bill the total can be put in one field; if traveler paid please list each night separately

## Reporting EXPENSES - BODY

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**Per Diem** – verify from Travel website link.

**Meal Deductions** – go to web location, if need to look-up rates.

**Registration/Banquet Fees** – must be approved on TA at same or more than actual amount.

**Parking/Tolls** - if parked at airport (POV), hotel, etc.(rental or POV)

**Misc** – Baggage charges, phone calls, travel card cash advance ATM or bank fees, etc.

# SIGNATURES

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Traveler's Signature– Required

If a visitor and traveler can't sign please email copy of ER and have them to reply back to travel services stating approved as submitted and TS will sign ER on traveler behalf

# Summary

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Attach all receipts to ER:

- Original receipts or copies + missing receipt form
- Actual Lodging Form \* – if lodging over per diem
- Cost comparisons or justifications \*
- JRT as attachment – if travel is for training
- Foreign trips
  - Cost conversion documents

# Where to Get More Information

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Review Admin Manual, section 402

Links on travel webpage

Review Travel Manual

Links on travel webpage

Email: Travel Services, [travels@jlab.org](mailto:travels@jlab.org)