

Travel Authorization Policy

PPD Policy 007-v02

Purpose

This document describes the responsibilities of the Particle Physics Division (PPD) personnel who wish to travel off-site for business.

Policy

Domestic Travel:

The traveler begins the travel process by informing the administrative assistant or initiating a Travel Authorization (TA) form on their own. If the traveler chooses to initiate their own TA, they must list the administrative assistant as "Travel Preparer" on the TA, save the TA (do not submit) then inform the administrative assistant that the TA is ready for review and approvals. Complete instructions for travel, including a link to the TA form may be found at this site:

<https://fermipoint.fnal.gov/service/TravelSystem/SitePages/TravelSystem.aspx>

PPD requires the following approvals for all travel: supervisor, reviewer, funding officer, and division head. Local travel requires additional approval from the CFO. In the event that one person serves multiple roles for approval, only the highest one needs to be specified.

Once the TA has been through all approvals it is routed to the Fermi Travel Office for final review and approval. Once the trip is fully approved and funds can be committed to the trip, the traveler and traveler preparer (the administrative assistant) will receive an email notifying them of such. The traveler must then email the Travel Office with their travel plans. It is a Laboratory requirement that all airline tickets be purchased through the Fermilab Travel Office. The Travel Office will not make any arrangements unless alerted by the traveler (or their administrative assistant).

Traveler preferences for certain flight days/times, airline and hotel preferences, or frequent flyer information can be added to the TA.

More information on domestic travel guidelines can be found here:

<http://travel.fnal.gov/domestic-travel/>

More information on Local Travel guidelines can be found here: <http://travel.fnal.gov/local-travel/>

Foreign Travel:

The same procedure as stated under the Domestic Travel Policy applies to Foreign Travel, with the following deviations: Travelers are required to submit their foreign travel requests for DOE defined non-conference travel at least 30 days before departure date. Requests to attend any DOE defined conference must be submitted to the Fermilab Travel Office well in advance before the "critical date" of the conference. Complete conference travel information can be found here:

<http://travel.fnal.gov/conference-travel/>

Foreign travel requires a specific “benefit to government” statement, host institution and host information, and cell phone number where the traveler can be reached internationally. Each country has specific requirements for country clearance, and the traveler must provide all required fields on the foreign TA form. Approvals required are the same as for domestic traveler: traveler’s supervisor, designated approver, funding officer, and division head are required.

If the traveler is taking personal time during business travel any costs in excess of business travel will be charged to the traveler. The allowed number of personal days is subject lab policy.

Trip Reimbursements

Upon completion of their trip, the traveler should turn in all applicable receipts from their trip to the administrative assistant **within 30 days of their return**. Accounting requires original receipts. If traveler has lost or misplaced a receipt they should discuss their options with the administrative assistant. Vouchers require approvals from both the Traveler and Funding Officer. If the Traveler and the Funding Officer are one and the same person, the voucher should be routed to appropriate division head delegate for funding approval. Once approved, the administrative assistant will prepare and submit the voucher to accounting for review and processing. Reimbursements are made via direct deposit into the traveler’s checking account (this info is provided separately to the accounting representative).

Owner

Responsibility for reviewing, updating, and communicating changes to this policy rests with the Division Administrator.

Review Cycle

This policy is to be reviewed at least every three years.

Definitions

Travel: Any business travel off-site, other than material pick-up or delivery that lasts less than 90 days.

Particle Physics Division Travel Representative: Luz Jaquez, ext. 8261.

Revision History

Version	Date	Author	Notes
v01	10/09/2015		Original Creation
v02	03/31/2019	Luz Jaquez	Updated for DocDB migration

