Travel

User ID:

Password:

Log In

Please login using your University NetID and password

For NetID assistance please see netid.uconn.edu

IBM FEB unavailable daily 3:00am-3:15am for maintenance
Travel WebForm

While the University Office of Travel Services does not require written preapproval for travel, University travelers are strongly encouraged to obtain written departmental approval before incurring any travel-related expenses. Individuals who incur travel expenses without the approval of their departments bear the risk that their expenses will not be reimbursed upon return.

Select the radio button for “Pre-Trip” to start the process.

**NOTE:** This is a dynamic form that opens and closes fields and boxes depending on what you select, so it is strongly suggested that you work from the top down to prevent you from missing any necessary information.
Select the radio button for “Myself” and your information will automatically populate in the ‘Traveler Information’ area.

Next, you need to indicate whether your travel is foreign or not by selecting one of the radio buttons.

If you select “Yes” the next page will show what the form looks like…
For Foreign Travel, it is important that you identify your gender and review all the information within this area of the form, especially with regards to “Travel Warning/Travel Alert Countries” and note that the active links on this page are updated regularly.

NOTE: Completion of a pre-trip is essential to being covered by the University’s insurance, especially for International Travel.
**Dates and Destination**

Complete the table adding rows for personal days and multiple destinations

* Does your trip include foreign travel?

   Destination outside of the 50 US States
   - [ ] Yes  - [ ] No

* Trip Dates

   Click + to add new entries, pencil to edit selected entries, and x to delete selected entries

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Purpose</th>
<th>State</th>
<th>Region</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no submissions.

* Traveling with group?

   - [ ] Yes  - [ ] No

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**Pre-Trip**

**Trip Details**

* Do you require a Bradley Parking Permit?

Students are not eligible for Bradley Parking passes. Graduate Assistants are
Complete the information in this box and click the “Add” button when done…see the next page for an example.

If you are presenting at a conference or event, it is recommended that you include that in the “Purpose”; i.e.: “Presenting at …”
Complete the table adding rows for personal days and multiple destinations

**Does your trip include foreign travel?**
- Yes
- No

**Trip Dates**
Click + to add new entries, pencil to edit selected entries, and × to delete selected entries

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Purpose</th>
<th>Region</th>
<th>State</th>
<th>City</th>
<th>Personal Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Presenting at the 2018 AERA Annual Meeting</strong></td>
<td>U.S. (Domestic)</td>
<td>New York</td>
<td>New York City</td>
<td>Yes</td>
</tr>
<tr>
<td>4/13/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4/17/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Do you require a Bradley Parking Permit?**
- Yes
- No

**Do you require a travel advance?**
- Yes
- No

Mileage and Tolls, Parking, Meals and Other are allowable expenses for advance.
Once you have completed the box and clicked “Add” you will see your information populated in the table.

NOTE: Parking for faculty, staff and graduate assistants at Bradley International Airport will NOT be reimbursed unless there are extenuating circumstances, such as flight delays, cancellations, etc.

This is generally not relevant for an individual scheduling their own travel and will usually be “No”.

If you are in need of a parking pass at Bradley International Airport, be sure to select “Yes” here.
If you select to have a Travel Advance, then this entry box will open.

The next two pages will provide additional information and examples about requesting a Travel Advance.
This is an example of the Travel Advance section completed.

**NOTE:** You can only account for travel expenses that can NOT be handled either by the contracted travel agency, Sanditz, (such as transportation or hotel) or by using the departmental credit card (registration).
Once you have completed the entry of your anticipated expenses, please be certain to read the agreement carefully.

You will then need to “sign” it by checking the box next to the “I agree.” statement and the date and time will automatically populate.
The “UConn Direct Payments” section is for any expenses that are either being billed directly or paid for in advance by the departmental credit card; these are expenses that you will NOT be claiming for reimbursement after you return from your travels. See the drop-down list for the applicable expenses.

If you still have to solidify your plans, then you can save this form and return to complete it after you have finalized your arrangements...see the next page for instructions on how to do this.
If you check this box, the “Save Draft” button will appear and when you click it, all the information you have entered to this point will be saved, but not yet submitted, so you can finalize your arrangements and come back into the form to complete it before you submit.
Back on the main Travel Services website, you will find the link for the “Sanditz Booking Tool” here...again, you will log in with your NetID and Password.
This booking tool can be used to make flight, train, hotel, and/or car reservations.

Once you have completed this process, make note of your final expenses and return to the main Travel Services webpage in order to get back to your saved Pre-Trip WebForm.
KEY POINTS REGARDING SANDITZ

AIRFARE:
- If you find a flight at a cheaper rate, they will price match…print or screenprint the information and communicate directly with Sanditz via phone or e-mail.
- If you have a frequently flyer plan with a certain carrier, you can include your number when you book with that carrier so long as the flight is in policy.

HOTEL:
If you have a special code or rate for a specific hotel(s) associated with your travel, there are 2 ways to utilize this using Sanditz for direct billing…
1) Call or e-mail Sanditz and provide the special code or rate along with all other pertinent information associated with your reservation needs; OR
2) Make the reservation directly and get the confirmation information from the Hotel, then call or e-mail Sanditz and give them the confirmation information and they can transition the reservation for direct billing.

For Hotel direct billing with Sanditz you will be required to provide a personal credit card to be on file, as any expenses beyond the room, tax and the standard fees will be charged to that card but could still be reimbursed if the charge is appropriate. It is advisable that you obtain a copy of your hotel receipt at check-out and be certain that it shows a ZERO balance due, regardless of the payment method.

RENTAL CAR:
Enterprise Rental Car is currently the approved vendor for the University. If you don’t book your rental car through them, then you must provide a reason why you did not use them and you need to print a price comparison from the Booking Tool to demonstrate how much it would cost using them.
Once you have completed your reservations, go back on the main Travel Services website and click the “WebForm Responses” button to go back to your saved form.
This will bring you to the listing of all WebForms associated with you, but you want to look for the one form that is indicated as a “Draft” and click anywhere on that line to open the form.
Now, you can go back to the “UConn Direct Payments” section and accurately enter the amounts for the direct billed items associated to your travel in this area of the Pre-Trip form. Be certain that you enter the amount, the KFS account to be charge and the type for each applicable item and then click the “Add” button, so that it will populate the table below.

In order to be certain that your Department Admin. can view your WebForm and assist with any necessary processing, you need to complete the “Select KFS Processor” section. First, select “Academic Departments” from the ‘Select Unit’ drop down menu...
Then select the name of your department, which could be at the top of the list or the bottom...the list isn’t in a standard order.
The Pre-Trip Notes are optional, but it is a helpful resource for useful information that is related to your travel, such as Faculty Travel Award amounts, other KFS accounts, etc. If you enter information into this box and click the “Add Note to Table” button, then it will be in the form when you return to submit for your travel reimbursement.
Last, but not least, be sure to hit the “Submit” button when you are done, otherwise the form won’t be completed and anything associated to it (parking pass, insurance, advance, etc.) won’t be processed.

<table>
<thead>
<tr>
<th>User</th>
<th>Stage</th>
<th>Time</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>csn02002</td>
<td>Start Pre-Trip</td>
<td>@ 9/27/2017 14:49</td>
<td>Submitted</td>
</tr>
<tr>
<td>csn02002</td>
<td>Post Trip - Reimbursement</td>
<td>@ 9/27/2017 16:09</td>
<td>saved</td>
</tr>
<tr>
<td>csn02002</td>
<td>Post Trip - Reimbursement</td>
<td>@ 9/27/2017 16:21</td>
<td>saved</td>
</tr>
</tbody>
</table>
Travel WebForm

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* Select Trip Type
  - Pre-Trip
  - Post-Trip

You will know the form has been submitted, if you get this box after hitting the ‘Submit’ button. Click ‘Ok’ and you are done until after your trip and you can close the tab and log off.
Travel WebForm

REIMBURSEMENT
Return to the Travel Website and select “WebForm Responses” again to go back to your previously submitted form. This will bring you to the listing of all your WebForms, but you want to look for the form that is indicated as a “Post Trip –” and just click on that line to open the form.

**NOTE:** If you have submitted more than one Pre-Trip form, then you may have to look through a few to find the appropriate one, but it is usually relatively easy to find.
Scroll down the form until you get the blue line that says “Reimbursement”, just below the Pre-Trip Notes you entered. This is where you will begin entering the items associated with your out-of-pocket expenses related to your travel.

**NOTE:** Do NOT worry about trying to change the radio button at the top of the form, it will remain on “Pre-Trip” and that will not interfere with anything moving forward.
First thing to identify is whether or not the actual dates of your travel are the same as the dates you indicated when you submitted the Pre-Trip. If this needs to be adjusted for any reason, select this checkbox and these date fields will become accessible for you to adjust. This can be particularly important further along in this form for things such as accounting for meal reimbursement.

**NOTE:** If you do make a change to your travel dates, be certain to indicate a comment in the Post-Trip Notes as to why this change was made, i.e. delayed or cancelled flight, rescheduled presentation, etc.
Otherwise, if your travel dates are the same as you entered in the Pre-Trip form, then proceed with the rest of the entry. Select the appropriate item from the drop-down menu and enter the departure and return times for your travels. The times are particularly important when it comes to meal per diems.

Now proceed to the first tab, **Airfare** and if you used Sanditz for your payment then you will likely not have anything to enter on this tab except perhaps the additional charge for Baggage, if applicable.
The next tab is “Registration” and if this was paid through your department’s credit card and recorded in the Pre-trip area, then you will not have anything to enter here. Otherwise, if you did pay for the registration yourself, then check the “I agree” box and enter the amount. Be sure to include your receipt for this expense with your other documentation once you have completed the WebForm.
The next tab is “Lodging” and as with the previous, if this was direct billed through Sanditz then you don’t enter anything. However, if you did pay directly or if you had an additional charge that wasn’t covered by Sanditz but is allowable for reimbursement, then you can check the “I agree” box and enter the amount, along with a brief indication of what the expense is for in the “Additional Information” box, if necessary, and continue on to the next tab.

NOTE: The original receipt needs to be included with your documentation and it needs to show “$0.00” as the balance due. This is VERY important, because this will hold-up the processing if the bill does not reflect a zero balance!
The next tab is “Car Rental” and again if this was direct billed through Sanditz then you don’t enter anything in here. However, if you did pay directly then you would check the “I agree” box and enter the amount. If the company you used was NOT the preferred vendor, then click this box and enter your reason in the dialogue box below by just clicking in the box and typing.

NOTE: Currently Enterprise Rental Cars is the preferred vendor for car rental. If you use another vendor then you have to provide justification for why you did so and you have to pull a comp. rate from Enterprise, as that will be the most that will be reimbursed.
The next tab is “Meals” and this is where you need to know the per diem rate for the location of your travel. You can find this either by selecting one of the links from the Main Travel Page or by selecting the appropriate link on this page and it will open a separate window for you search for the per diem rate…see the next page for examples.
This is an example of what the page will look like when you select the ‘Domestic’ rates. Enter either the City and State where you traveled or the zip code and click the “Find Rates” button.
When you get to the next screen, look all the way to the far right under “M&IE”, which stands for “Meals and Incidental Expenses.” This is the per diem rate that you will use on your form. Remember this amount and return to the WebForm to enter it in.
When you get back to your WebForm, first select the appropriate radio button for “Domestic” versus “Foreign” Rate and then find the appropriate rate in the drop-down menu. Lastly, enter the city and state associated with your travel by filling in the “Location” box.
Once you have done so, the chart below that will automatically populate with the appropriate rate for each day as if you were NOT provided any meals during your event.

If that is the case, then you are done with this tab.

If not, see the next few pages for continued instructions…
If you need to indicate that a meal(s) was provided, then first click on the date line that you need to adjust from within the chart and when you do so, the “Update” button will appear and the date you selected will be populated in this box.
Then you will need to select the meal or meals that were PROVIDED to you on that day from the drop-down menu.

**NOTE:** If the date you selected was a personal day, then be certain to indicate it by selecting “Personal Day” and all expenses will be removed for that day.

Also, the last three options in the list are to be used if the event provided a meal but you did not partake in it for one of these reasons, which meant that it was necessary for you to pay for your own meal. This is important to note, in case your WebForm is audited by the Travel Office when processed!
Once you have selected the appropriate option, be certain to click the “Update” button and that date line will drop to the bottom of the chart with the now adjusted per diem rate and the notation of the meal(s) that was provided within the chart.

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Select Rate Type</th>
<th>Rate</th>
<th>Meals Provided</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/14/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>None</td>
<td>$74.00</td>
</tr>
<tr>
<td>4/15/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>None</td>
<td>$74.00</td>
</tr>
<tr>
<td>4/16/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>None</td>
<td>$74.00</td>
</tr>
<tr>
<td>4/17/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>None</td>
<td>$74.00</td>
</tr>
<tr>
<td>4/13/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Breakfast and Lunch</td>
<td>$39.00</td>
</tr>
</tbody>
</table>

**Total Per Diem Amount Claimed**: $335.00
**Total Eligible Per Diem Amount**: $335.00

*Receipted Meal Claim*
If you check this, you are claiming receipted meals which is added to your total round.
Please click below for looking up meal rates. Use M&E rate.

**Domestic Meal & Hotel Per Diem Rates**
**International Meal & Hotel Per Diem Rates**
**Classified Bargaining Units**

Select Domestic Rate or Foreign Rate
- **Domestic Rate**
- **Foreign Rate**

Location: New York City, NY

Select Rate: $74

Date: 4/17/2018

Select Meals Provided: Breakfast only

Amount: $57.00

**Meals Section**

Hint: To edit, click the row in the below table, and update in the above form and click 'Update' button. Also, use departure and return date to change date range.

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Select Rate Type</th>
<th>Rate</th>
<th>Meals Provided</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/13/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Lunch only</td>
<td>$56.00</td>
</tr>
<tr>
<td>4/14/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Breakfast and Lunch</td>
<td>$39.00</td>
</tr>
<tr>
<td>4/15/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Breakfast and Lunch</td>
<td>$39.00</td>
</tr>
<tr>
<td>4/16/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Lunch and Dinner</td>
<td>$22.00</td>
</tr>
<tr>
<td>4/17/2018</td>
<td>New York City, NY</td>
<td>Home Rate</td>
<td>$74</td>
<td>Breakfast only</td>
<td>$57.00</td>
</tr>
</tbody>
</table>

**Total Per Diem Amount Claimed**: $213.00
**Total Eligible Per Diem Amount**: $213.00

You may check this field only if you are claiming receipted meals which is added to your total refund.

Continue this process so that the chart accurately reflects the meals that were provided on the applicable day(s) and the calculations will adjusted automatically.

**NOTE**: Though it is no longer required to provide a copy of the agenda for a meeting or conference when submitting a travel reimbursement, the Travel Office DOES conduct random audits and if a discrepancy is found then the reimbursement may be reduced or disapproved and the traveler may have issues with future reimbursement submissions.
The second tab under “Meals” is to be used if you paid for a Business Meal during your travel.

If you did, then click on the button to add an item to the chart and a separate entry box will open.

Fill in the box with all the relevant information and click the ‘Add’ button.

If you have multiple people on the receipt that you paid for, there is also a link to the “Business Meal Form” that can be used instead of the entry box.

Either way, be certain to provide the original documentation with your receipts when you have submitted your Travel WebForm for approval and be certain that you have either deducted your expense from the receipt or that you have indicated that this meal was “provided” on the per diem meals chart.
The final tab under “Meals” is for meals that you are requesting reimbursement for in regards to travel where there was no overnight stay...such as same day travel to and from a relatively close conference. Again, be sure to complete all relevant information and click the ‘Add’ button in order for the meal(s) to be populated in the chart and accounted for in the summary.
The next tab is for "Mileage" reimbursement, which can be used for travel to and from the airport or for travel to and from the event itself.

In order for this part of the form to open up, you will first need to indicate the one way mileage for your commute from your home to the building and enter your home address.
Once you have entered this information into the form, the ‘Mileage Log’ chart will open up and you can click on the button to open an entry box in order to enter your mileage information.
Within this entry box, enter the necessary information with regards to the date, the ‘From’ and ‘To’ locations, the purpose, and the mileage. You can then indicated the mileage as one-way or round-trip. If you indicate the mileage as round-trip, then you would only need to put the first date of your travel and the one-way mileage and once you change the radio-button to ‘Yes’, then the form will double the mileage you entered.

However, if your mileage varied in any way, then you would want to enter each as individual entries.

Next, be sure that you select whether you started and ended your trip from your work location, so that the mileage is accurately adjusted.

Lastly, if the entry you are putting in is a ‘Business leg’ of your travel, as in you went from one work-related location to another work-related location and that is the mileage you are entering, then be sure to click the radio-button.

Click the ‘Add’ button to complete each entry and populate the log.
Once you have entered your information into the box, the ‘Mileage Log’ chart will show your entry and will automatically calculate the rate based on your entry and the travel date, as there are times when the per mile rate is adjusted.
The final tab is **Other** and this is for all those miscellaneous receipts that you may have from your travels, such as a taxi ride or payment for copies made for your conference presentation.

As with other areas in the form, first click to add something to the chart and a separate entry box will open up.
Within this box you will be able to enter two different types of receipts, “TRANSPORTATION” or “Business Expenses.” First enter the date on the receipt, then select the appropriate drop-down list.

See the following two pages for a view of what is available from each list…
Options for ‘TRANSPORTATION’…select the one that best fits your receipt and enter the amount, then click the ‘Add’ button to enter that item into the chart.

NOTE: If you select “Other”, then a text box will open up and you need to give a brief description of the type of transportation.
Options for ‘Business Expenses’…again, select the one that best fits your receipt and enter the amount, then click the ‘Add’ button to enter that item into the chart.

**NOTE:** If you select “Other”, then a text box will open up and you need to give a brief description of the type of business expense.
Once you have finished entering all your other receipts into the chart, then be certain that you provide the original receipt with your documentation after you have submitted your Travel WebForm for approval.

At this point, all of your expenses should be documented within the form and you can see the summary of what you have entered in this dynamic box that will continue to adjust, reflecting all your entries within the form as you go along.
Now you will be able to see the total amount that has been calculated based on your entries as being the amount to be refunded to you as the traveler.
If you had previously selected to receive a Travel Advance, then you will see that amount carried over and reflected here, so that the refund amount reflects that amount.

**NOTE:** If the “Refund to Traveler” amount is a negative number, then you need to pay back the difference to the University. Be sure you bring this to the attention of the staff member who is assisting with the financial entry for your travel, as the entry process is different and needs to be completed in a timely manner!
The KFS Accounts area of the form is where you reflect what account number will be used to pay for the reimbursement of your travel. Be certain to fill in the Account number, the Amount to charge to that account, and the Object Code (pick from one of the option below) and click the ‘Add’ button.

Be certain that the account information is populated in this chart and the expected total funding amount is reflected in the “KFS Totals” box.

IMPORTANT NOTE: Completion of this form is not a guarantee that the traveler will receive any or all of the “Refund to Traveler” amount, so be certain you have your funding identified PRIOR to your travel!
Continuing down the form, you will again need to enter the appropriate Unit and KFS Group for your department and remember that it is important that this is accurate, otherwise the staff member within your department won’t be able to process your reimbursement!

Next comes your “Signature” for the form. Be sure you read the statement presented in this box and when you click the “I Agree” box, the date will automatically populate.

Next is to enter the name of the Supervisor who is authorized to approve your travel expenses in these two boxes…be sure that there are not extra spaces entered after you type their first and/or last name, otherwise the ‘Search’ will not work.
Once the first and last name are entered, then click the “Search” button and you should see their name and department affiliation in the drop-down menu. Be certain to select them from this list and if all has been done appropriately, their e-mail address will automatically populate into the ‘Supervisor Email’ box.

**NOTE:** This is important, because without this entry being correctly entered, your WebForm will not be received by the appropriate person for approval and that means the reimbursement will not be able to be finalized.
The last area of the form is optional, but should be used if there are any final details or pertinent information that needs to be shared in order to avoid delays in your form being approved and/or your reimbursement being processed. If you enter anything into this dialogue box, be sure to click the ‘Add Note to Table’ button, so that it becomes part of the form.

Last, but not least, be certain to click the “Submit” button when you are done with everything, so that your form is able to be reviewed, approved and processed.
A few other items to point out on the Travel Services website…first is the Travel Policy, which is viewable in a PDF format, located here.

In addition, there is an FAQ page that gives a lot of good information both when planning a trip and when you return.
Also, please note that under the “Travel Forms” drop-down menu there are links to several items, but two are notable… the first is the “Exception to Policy” form and the second is the “OVPR/AAUP Funding Application” link.
Travel Website: travel.uconn.edu

Travel Office contact information:
Phone: (860) 486-4137, ext. 2
E-mail: Travel@uconn.edu

Sanditz contact information:
Phone: 1-877-826-6733
E-mail: UConn-resdesk@sanditz.com

Thank you for your attention to this instructional presentation!
Happy Traveling!