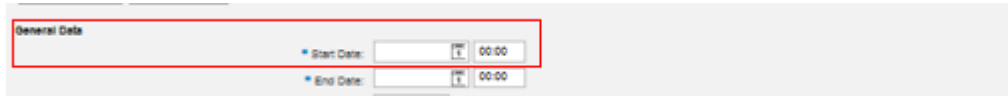# Commonwealth University
TM – Travel Management
Quick Check List

A travel request is always required prior to travel, unless the following exceptions are met:

- Must be non-overnight travel;
- This type of travel is a regular part of your duties;
- The only expense is personal vehicle mileage;

Note that items marked with a $*$ are required fields.

Fill in required fields

General Data/Dates:

- Dates can be entered manually or by opening the calendar;
- Time must be entered in military format;
- Posting date will default to trip end date;

Destination:

- Trip country – will default to US;
- Trip region – enter manually or use search (remember to capitalize state abbreviation, PA* (capitalize both letters), and city, "Bloom*" (capitalize first letter only));
- Destination – free text, location/name of training;

Additional Information:

- Estimated costs, hotel and meals, will populate based on dates and location entered (these can be changed if necessary);
- Meals will need to be adjusted for meals provided at conference/training/meeting;
- ***Note:*** *if traveler is not claiming hotel and/or meals, these must be reduced to $.01;*
- ***"Insurance Purpose Only"*** *traveler enters actual expenses on Travel Approval Request and then REDUCES the sum to $.00 by entering a negative amount under "Z:Unfunded Travel Cost"; see below:*

Estimated Costs		
Calculate		
Travel Mediums	**Estimated Costs**	**Curr...**
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	294.00	USD
Meals/Subsistence	177.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	**471.00**	**USD**

Estimated Costs		
Calculate		
Travel Mediums	**Estimated Costs**	**Curr...**
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	294.00	USD
Meals/Subsistence	177.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	471.00-	USD
Sum	**0.00**	**USD**

Click "Accept" to save and return to main screen;

- **Reminde**r: initial and date all receipts and attach to your expense report. Keep originals on file in your office;
- Approvers who are also cost center managers will have to approve their own travels. Watch for an automatic email;
- Payment made to third party (excluding Enterprise):
  - Follow instructions and complete Direct Pay Request Form;
  - Forward for approvals along with necessary documentation.

Tips:
- Mileage only requests for recurring trips may be submitted on a monthly basis. Traveler may use the mileage log and submit the mileage as one total:
  - Use the last day of the month as your travel date (non-overnight travel);
  - complete the mileage log and save it to a file;
  - use the total number of miles in your expense report;
  - upload your log as an attachment

- While traveling within the state of Pennsylvania, we are exempt from local and county lodging taxes. Documents are available for travelers to provide to hotels.
- When reserving an Enterprise rental, be sure to use the link on the Travel Management page. This will result in accurate billing to our corporate account
- Travel policy and forms may be found on this page:
  - **https://www.bloomu.edu/offices-directory/accounting-services**   REVISE
- The Travel Management system will default to the cost center that the traveler's salary is charged to. It is important for the traveler to know what cost center they should be using.

10/17/2024