

Travel Process for Beginners

Prepare for the Trip

Review the University Travel Policy.

Work closely with your delegates, and Sponsored Projects Administration if travel will be funded from a grant, to ensure estimates entered on the pre-approval are as accurate as possible.

Ensure your delegate knows how you would like your travel purchases paid for:

- If you would like the University to directly pay for a conference registration, hotel associated with a conference registration, or any other travel-related prepayment, ensure your delegate has any applicable paperwork or payment instructions
- If you would like the University to directly pay for air, hotel, or rail through Egencia, the University travel booking tool, you will have access to the University travel card upon approval of the trip, for that trip

Obtain Approval to Travel

Travelers must have an approved, itemized Pre-Approval prior to booking travel or actually traveling.

The Pre-Approval is entered by the traveler's delegate in Chrome River (which can be found on the my.bsu webpage under 'Additional Tools'). The Pre-Approval includes:

- Dates and locations of travel
- All estimated, itemized expenses for the trip, which includes any air, hotel, or rail items which are to be booked in Egencia (which can be found on the my.bsu webpage under 'Additional Tools') if applicable.

You will approve the Pre-Approval, followed by other approvers, and you will receive an e-mail when the Pre-Approval is fully approved.

Book Travel

Once the Pre-Approval is fully-approved, you may now book travel. If requested and approved on the Pre-Approval, you will now be able to book air, hotel, or rail through Egencia with the University travel card up to the limits indicated on the Pre-Approval.

Be Reimbursed for Remaining Travel Expenses

Expenses may be submitted for reimbursement before or after your trip, depending on the purchase date. Please ensure both you and your delegate comply with the [Expense Reimbursements Accountable Plan](#) for both receipt submission and expense report creation.

Ensure the expenses for which you wish to be reimbursed comply with the University Travel Policy.

Submit receipts to your delegate. Although the Travel Department will not require original receipts, be sure to follow your departmental procedures regarding receipt submission (whether physical copies must be returned to your department or whether scanned/photographed receipts are acceptable).

Your delegate will then create your expense report in Chrome River.

You will approve the expense report, followed by other approvers, and you will receive an e-mail when the expense report is fully approved. Once your expense report has been fully approved, you will be paid the amount approved on your expense report within a few days.