



January 28, 2011

Travel Update

When you come to the Travel Update segment of a PSC Town Hall meeting, you'll learn all about how the PSC – in collaboration with a number of campus representatives – is working to improve the business process for business travel. In the meantime – following is a sneak peek into one aspect of our travel initiative:

- The University will benefit from a truly online travel reservation and booking system. In keeping with our desire to keep up with technology, this system will be similar to online travel websites you may already be familiar with for personal travel (Orbitz, Travelocity, etc.).
- This means that you will be able to book flights, make hotel reservations, and arrange for rental cars – all within a single web interface.
- Supporting our online site will be a new approved travel management company. A Request for Proposal (RFP) process was recently completed and **Christopherson Business Travel** was selected for this critical role. Christopherson has significant experience supporting institutions of higher education and – of particular interest – they have direct experience with the federal requirements for flying that many of our campus departments face on a regular basis. Christopherson is headquartered in Utah and has a significant presence in Colorado. We are especially pleased to announce that it is a woman-owned small business.
- Perhaps the greatest benefit of this system is that it will be integrated with the Concur Expense System already being used to authorize and reimburse travel. Itineraries and authorizations can be easily imported into expense reports in a single click, reducing the time and effort required to create and submit expense reports after traveling.

In the mean time, nothing has changed. It's (travel) business as usual. Please continue to use the same [approved travel agencies](#) you are using today and follow the same processes. We'll outline the timeline for change at the PSC Town Hall meetings next month. So don't forget to [register soon!](#)

Reminder: Register for PSC Town Hall

Each Town Hall meeting will consist of two segments: **CU Marketplace** (first 90 minutes) and **Travel Update** (60 minutes, after a break):

- Mon, Feb 21 & Tues, Feb 22 – Boulder
- Wed, Feb 23 – Downtown Denver
- Wed, Feb 23 & Thurs, Feb 24 – Anschutz
- Mon, Feb 28 – Colorado Springs

Session details (times, room locations) and registration information are available on the [PSC Town Halls page](#).

Business and Personal Travel

On occasion, travelers find that their business travel and personal travel plans coincide. In this case, both the Travel Authorization (TA) request and the Itinerary should identify the complete (combined business/personal) days of the trip...and both should be created in the Expense System before the trip begins. The steps are as follow:

Create TA (before the Trip)

Whoever is responsible for creating TA requests should create the TA for the traveler. (Do not create the TA as a delegate for the traveler.) Use the actual begin/end dates of the combined business/personal trip. Use the TA Comments field to explain which days are personal.

Book Travel/Create Itinerary (before the Trip)

Whoever is responsible for making travel arrangements should book the trip.

Whoever is responsible for creating Itineraries in the Expense System (the Itinerary calculates per diem amounts when it is attached to the Expense Report after the trip) should create the itinerary for the traveler. (**Do** create the Itinerary as a delegate if you are not the actual traveler.) Use the actual begin/end dates. If travel dates have changed since creating the TA (due to flight availability, etc.), use the correct dates in the Itinerary and explain the change of dates in the Comments field on the Expense Report, after the trip.

In the Itinerary: always mark the begin and end days (the so-called "shoulder days" of travel) as business. This is because the prompt for the trip itself is some official university business. The intervening days should be marked as personal (excluded from per diem) as appropriate.

Need some help? You can get it from the Finance & Procurement Help Desk: FinProHelp@cu.edu or 303.837.2161.

When Do You Need a TA?

The [PSC Procedural Statement Travel Authorization & Expense](#) tells us that we need a Travel Authorization (TA) number when we travel on university business outside of Colorado...or on a common carrier to any destination. It doesn't matter if an outside entity is covering the cost of the business trip.

When is a \$0 TA OK?

You should only create zero-dollar (\$0) TAs if you expect to have **no reimbursable expenses** for an official university business trip.

Questions? Contact FinProHelp@cu.edu or 303.837.2161.