



**National Institutes of Health**  
**Office of**  
**Acquisition and Logistics Management**

***APRO***  
***Travel Process***  
***Standard Operating Procedures***  
***(including when Training is involved)***

***January 2012***

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# Office of Acquisition and Logistics Management

## Simplified Purchasing Standard Operating Procedure

### Purpose

To provide detailed guidance for completing the simplified purchasing process.

**The owner of this procedure document:** Administrative Services Office, APRO, OALM

### Responsible Parties

Traveler, Traveler's Supervisor and Concurring Authority, Travel Planner, Omega Travel, Administrative Technician/Travel Reviewer, Administrative Officer, OALM Budget Office, NBS Travel Office, Office of Financial Management, Chief Administrative Officer, Executive Office (if applicable).

### Description of the Travel Process

When an OALM employee has an official travel requirement, s/he initiates an authorized travel request and supporting documentation, submits it to travel planners / administrative personnel for review, processing, and approval, and receives e-travel documents from Omega. Upon the traveler's return, s/he submits the original receipts for reimbursement within five business days.

Included in this SOP:

- OALM Travel Document Checklist
- OALM Travel Roles & Responsibilities Table
- OALM Training Document Checklist
- The Travel Process, including when Training is involved

### OALM Traveler Responsibilities

The traveler's responsibility is to inform his/her divisional Planner of a travel request by using the NIH Travel Request Form and other associated documentation, signed by their supervisor. These documents give the Planner the necessary information at the standard two week deadline before a domestic trip departure date. Failure to submit forms two weeks before the departure date could result in a lack of travel advance monies, delays due to GovTrip profile issues or, ultimately, no travel. AOs keep customers informed of the status of each travel request by email. They resolve issues as they arise. The following steps will reflect individual responsibilities.

Step I: Employee completes travel request form

Step II: Planner review and forward to Melissa in OALM Budget Office.

Step III: Melissa returns to Planner

Step IV. Planner forwards to AO to complete travel process.

**On return from the trip, the traveler provides all original receipts to the Planner within five business days. They receive reimbursement from Accounts Payable within 5-7 business days.**

### OALM Divisional Travel Planners' Responsibilities

One or more divisional Planners are responsible for making transportation and hotel reservations using the on-line booking tool in GovTrip, talking with Omega if necessary, and making sure all travel details are present on the Travel Request. They also create and route authorizations for approval, and prepare vouchers for traveler certification and approval by the Administrative Officer. These activities include 1) making sure all proper documentation is attached to the document 2) ensuring that all justifications are provided and 3) communicating with the traveler regarding travel plans and reimbursements.

## **Administrative Officers' / Administrative Technicians' Responsibilities**

The AO's responsibility is to oversee the travel processes, to meet regularly with customers to stay abreast of current and future travel needs, and to authorize customers' detailed travel requests **two weeks prior to the trip departure date for domestic travel and eight weeks prior for international travel.**

AT's receive Travel authorizations from planners electronically. They review them to ensure accordance with travel policy and route them to the AO for authorization.

## **OALM Financial Coordinator**

The OALM Financial Coordinator certifies that funds are available for each trip and advises and guides Administrative Officers about issues and changes in financial matters.

## **NBS Travel Office**

The NBS Travel Office maintains the GovTrip system and implements new functionality as it becomes available. They are responsible for training new systems (NIHTC takes over the training current travel systems). For travel questions that come to the NIH Help Desk, the NBS Travel Office answers Level 2 and Level 3 issues.

## **Omega**

Omega is responsible for booking all reservations when they have received authorization through GovTrip or phone/fax from a travel planner. They email the itinerary once the travel has been authorized.

## **Office of Financial Management**

When the AO approves travel documentation, funds are automatically committed. When the trip is over, the traveler submits a voucher and the AO approves it, the Travel Audit Office reimburses the traveler for approved expenses and submits Treasury batches. They also troubleshoot obligation of payment issues. OFM also houses the NIH Travel Policy Office.

## **Chief Administrative Officer's (CAO's) Responsibilities**

The CAO has oversight of the Administrative Service portion of this process. The CAO creates systems to ensure that these processes are tracked and completed in a timely manner, makes process changes as recommended by customers and AOs, and provides advice and guidance as administrative staff resolve issues.

## **Executive Office**

The Executive Office reviews all foreign travel and the justifications for hotel over the per diem, rental car, sponsor travel, premium travel, cash paid for a ticket over \$ 100 and travel of a foreign flag airline.

## **Systems for Traveling**

- GovTrip

## **Systems for Training**

- NIHITS, which will be replaced by LMS
- NBS (for purchase requests for training)
- Purchase Card (see Purchasing SOP)

## **References**

**Domestic Travel Process (Authorization):** <http://odeo.od.nih.gov/Page.aspx?ID=789&CT=1>

**Travel Voucher Process:** <http://odeo.od.nih.gov/Page.aspx?ID=793&CT=1>

**Foreign Travel Process:** <http://odeo.od.nih.gov/Page.aspx?ID=794&CT=1>

## Points of Contact Information

| Type of Information                           | Contact Person   | Phone  | Email  |
|---|--|--|--|
| GovTrip                                       | GovTrip Help Desk  | 301-496-HELP                                 | Weblink:<br>Help Desk page on GovTrip  |
| Travel HPOC                                   | List of all OD HPOCs   |  | NBS Travel Portal or GovTrip User Page   |
| Financial Coordinator                         | Melissa McKerrow<br>Stephanie Russell                            | 301-402-0577<br>301-496-7088                 | <a href="mailto:Melissa.McKerrow@nih.hhs.gov">Melissa.McKerrow@nih.hhs.gov</a><br><a href="mailto:Stephanie.Russell@nih.hhs.gov">Stephanie.Russell@nih.hhs.gov</a>                 |
| Travel Policy                                 | Florence Howard (NIH)<br>T'Ebony Carver (OD)<br>Leah Stroud (OD) | 301-435-3023<br>301-594-8276<br>301-594-8274 | <a href="mailto:Florence.Howard@nih.hhs.gov">Florence.Howard@nih.hhs.gov</a><br>T'ebony.carver@nih.hhs.gov<br><a href="mailto:Leah.Stroud@nih.hhs.gov">Leah.Stroud@nih.hhs.gov</a> |
| Office of Financial Management – Travel Audit | Karen Allen  | 301-435-2927                                 | <a href="mailto:Karen.Allen@nih.hhs.gov">Karen.Allen@nih.hhs.gov</a>   |

## Training

|                              |  |              |  |
|------------------------------|--|--------------|--|
| AO                           | First POC for training questions           |              |  |
| Purchase Card Program Office | Help Credit                                | 301-435-6606 | <a href="mailto:creditcard@od.nih.gov">creditcard@od.nih.gov</a> |
| JPMorgan                     | 24 Hour Customer Service for Purchase Card | 888-297-0781 |  |

## Travel Request Processing Times

### Travel

2 weeks from receipt of completed Travel Request package to process domestic travel

8 weeks from receipt of completed Travel Request package to process international travel prior to departure (Executive Office deadline)

8 weeks from receipt of completed Travel Request package to process international travel (Administrative Office deadline)

### Training

6 weeks or more in advance of class dates to ensure registration

# OALM Travel Document Checklist

Here is a list of the documents required for different Travel (and Training) actions:

## **FOR TRAVEL**

- Routing and Transmittal Slip with appropriate names, locations, actions and signature of requestor.
- Travel Request Form  
Include traveler information, trip details, sponsor travel information (if any), travel expenses and preferences and cash advance (if requested) along with the recommending official's signature
- Justifications: enter information into the comments field of the Travel request form if:
  - Hotel over the per diem (AEA-Actual Example Allowance)
  - Rental car
  - Foreign travel
  - Sponsor travel
  - Premium travel
  - Cash paid for ticket over \$ 100
  - Travel is on a foreign flag airline (Foreign Flag Carrier Form)
  - Travel over \$10,000.00
  - Late submission: If received less than 14 calendar days for domestic and less than 8 weeks for foreign, provide justification.

If any of these need to be justified, the AO will route the package to the Executive Office for Actual Expense Allowance (AEA) approval.

The above documents can be scanned, uploaded and saved. The Executive Office, however, will require a hard copy package if they need to review the travel plans.

- Travel Voucher on the GovTrip portal page. A Traveler may choose split pay—in other words, part of the reimbursement to the credit card bank and part to the traveler. This document needs to be hard copy.

## **IF TRAINING OR A CONFERENCE IS INVOLVED**

- OALM Training Nomination
- Attachment of the conference / convention / training agenda / schedule, fees and registration procedure
- IDP

|   | Category              | Item   | Required Lead Time  |
|---|-----------------------|--|---|
| non-NIH   | New non-NIH travelers | ACH  | add 4 weeks to deadlines below so they can be added to the system |
| Desination & Type   | Local                 | Local-registration costs for non-gov't sponsored mtg | 1 day after return  |
|   | Domestic              | Non-Sponsored Authorization                          | 14 days   |
|   | Foreign               | NFT  | 8 weeks   |
|   |                       | Passport & Visas                                     | 8 weeks   |
|   | Sponsored             | Non-Sponsored Authorization                          | 8 weeks   |
|   |                       | Sponsored Travel Approval                            | 10 weeks  |
| Special Costs   | Premium Class         | Medical or Disability                                | Foreign 8 weeks/ Domestic 14 days                                 |
|   |                       | Non-Medical  | Foreign 8 weeks/ Domestic 14 days                                 |
|   | Cash Ticket           | Cash Tickets in Emergency                            | n/a   |
| Post Trip   | General               | Travel Voucher                                       | 5 days after return   |
|   | Foreign               | Notification of Foreign Travel (NFT) Trip Report     | 9 days after trip   |
| Requires approval in Building 2   |                       |  |   |
| <p>Requests for foreign flag or non-contract carrier or Actual Expense Allowance (AEA) should be submitted with the packages. They do not have a separate deadline.</p> <p>Passports and Visa requests should be submitted to:</p> <p><b>Sandra Fuentes</b><br/> <b>International Travel Assistant/Passport Agent Fogarty International Center National Institutes of Health</b><br/> <b>31 Center Drive MSC 2220</b><br/> <b>Bldg 31 Room B2C08</b><br/> <b>Bethesda, MD 20892</b><br/> <b>Phone: 301.496.3441</b></p> |                       |  |   |

## Roles and Responsibilities in Travel Documentation

|   |              |  |                           |
|---|--------------|--|---------------------------|
| Travel Request Form and associated documents<br><b>All detail information is required</b> | Traveler     | Traveler completes sections 1-7 of the Travel Request form with desired travel details, signs it, routes it to their manager for signature, to the director, to the planner, and then to the AO. | TT : 1 hour<br>ET :       |
|   | Supervisors  | Signs Travel Request and routes it to the Director, who signs  | TT: 10 mins               |
|   | AT / AO      | Reviews the documentation for adherence to travel policy and routes it to the budget officer for funds availability,   | TT : 1 hour               |
|   | Fin'cl Coord | Checks funds availability and CAN #s, stamps "Funds are available," signs and dates the form.  | TT : 10 mins              |
|   | AO           | If there are justifications for any of the reasons, AO routes the package to the Executive Office for AEA approval.  | TT: 30 mins<br>ET: 1 week |
| GovTrip   | AO           | Authorizes the travel in GovTrip, obligating funds.  | TT: 15 min<br>ET: 2 days  |
| NIH Travel Voucher on the portal  | Traveler     | When Traveler returns, he/she completes form, attaches original receipts and routes to Planner / AO  | TT: 20 mins<br>ET: weeks  |
|   | AO           | Authorizes payment of voucher in Gov Trip  | TT: 10 mins<br>ET: 1 day  |

| <b>When Training is Involved</b> |                      |   |                           |
|----------------------------------|----------------------|---|---------------------------|
| OALM Training Nomination         | Person being trained | Person requesting training completes the OALM Training Nomination form, attaches a print-out of the course and registration process, and routes it to supervisor, director, planner and AT/AO.                | TT: 30 mins<br>ET: 2 days |
|                                  | AT / AO              | Check details and pricing. Sends request to Financial Coord.  | TT: 30 mins               |
|                                  | Fin'cl Coord         | Checks funds availability and CAN #s, stamps "Funds are available," signs and dates the form.   | TT: 10 mins               |
|                                  | AO                   | Completes registration, pays by purchase card, informs the person to be trained of the registration by email. On the 13 <sup>th</sup> of the month, reconciles the purchase following the SOP for Purchasing. | TT: 1 hour                |



| Approval Levels Based on Travel Delegations |                         |   |   |
|---|-------------------------|---|---|
| Travel Activity                             | Approval Level          | Submission Method                                     | Sample Justification  |
| Domestic Travel                             | Servicing AO            | Govtrip   | IDP   |
| Foreign Travel                              | Conditional approve: AO | Govtrip   | <a href="#">n/a</a>   |
|   | Final approve:          | Govtrip   | <a href="#">n/a</a>   |
| Sponsored Foreign/Domestic                  | Conditional approve: AO | Govtrip   | <a href="#">n/a</a>   |
|   | Final approve:          | Govtrip   | <a href="#">n/a</a>   |
| Special Authorizations                      |                         |   |   |
| Rental Car                                  | Servicing AO            | In comments section of travel request                 | Logistical, cost, availability/comparative costs of local transportation.   |
| AEA-Non-sponsored                           |                         | In comments section of travel request, memo, or email | Availability of lodging at per diem rate cannot be obtained.  |
| AEA-Sponsored above per diem                | Ethics                  | Notation on the travel request & memo                 | Available accommodations cannot be obtained within a reasonable commuting distance and transportation costs to commute to and from the less expensive hotel consumes most or all of the savings achieved. |

|   |   |  |   |
|---|---|--|---|
| Non-Contract Carrier  |   | In comments section of travel request  |   |
| Cash Ticket   | EO                                      | Email or an after the fact memo  | NIH TMC has no control (i.e. location of mtg in a foreign country rural area) |
| 1)Rail (Regional) non gov't rate<br>**FTR301-10.160.164<br>2) Rail Premium Coach (gov't rate) | Servicing AO                            | n/a  | n/a   |
| Foreign Flag Carrier  |   | Attachment   | U.S. flag unavailable.  |
| Premium Class-Non medical   | EO                                      | Attachment   | Unavailable space in coach class.   |
| Premium Class-Medical   | 1)Assoc Dir for Admin, OD<br>2) NIH DDM | Attachment sent 20 days in advance of trip start date for domestic and 45 days for foreign | Medical documentation   |

# **APRO Workload and Workforce Assessment Travel and Training Process**

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|   | <b>Initiating Travel Action</b>  | <b>Traveler</b> | <b>Planner</b> | <b>AT/<br/>AO</b> | <b>Signing<br/>Author-<br/>ities</b> | <b>GovTrip<br/>or<br/>Omega</b> |
|---|--|-----------------|----------------|-------------------|--------------------------------------|---------------------------------|
| 1 | Traveler initiates travel discussion a manager, Traveler completes Travel Request, including details of travel, preferences, justifications, etc., and attaches associated documents two weeks before travel date for domestic travel and 8 weeks before travel date for international travel. The traveler’s supervisor and director sign the Travel Request and routing slip. Signature means agreement with travel as long as there’s funding. Signatures prior to planner. Signature prior to planner. | ✓               | ✓              |                   | ✓                                    |                                 |
| 2 | Financial Coordinator certifies funds availability, stamps “Funds are Available,” signs and dates the stamp and the routing slip back to the Planner.  |                 |                |                   | ✓                                    |                                 |
| 3 | Planner enters the detailed information into the booking tool of GovTrip.*   |                 | ✓              |                   |                                      |                                 |
| 4 | Planner finalizes the package, scans, saves and uploads the documents to the travel order and sends all to the AT/AO.  |                 | ✓              |                   |                                      |                                 |
| 5 | GovTrip notifies AO by email that there is a travel authorization for approval.  |                 | ✓              |                   |                                      | ✓                               |
| 6 | AO authorizes travel, committing funds.  |                 |                | ✓                 |                                      |                                 |
| 7 | AO/AT sends copy of approved GovTrip itinerary to Traveler   |                 |                | ✓                 |                                      |                                 |

\* If the Travel is complicated or international, the planner may call Omega and fax the document, which incurs a higher fee. If the Planner calls, she **must** fax the documents.

|                |                 |                |                |                        |                            |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|
| <b>Legend:</b> | <b>Traveler</b> | <b>Planner</b> | <b>AO / AT</b> | <b>GovTrip / Omega</b> | <b>Signing Authorities</b> |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|

Continued

|    | <b>Processing Travel Requests</b>  | <b>Traveler</b> | <b>Planner</b> | <b>AT /AO</b> | <b>Signing Authorities</b> | <b>GovTrip Omega</b> |
|----|--|-----------------|----------------|---------------|----------------------------|----------------------|
| 8  | If Omega has questions or issues, they contact AO by email.  |                 | ✓              | ✓             |                            | ✓                    |
| 9  | AO resolves any travel issues with all parties.  |                 |                | ✓             |                            |                      |
| 10 | Omega receives authorization and ‘cuts the ticket’ electronically.   |                 |                |               |                            | ✓                    |
| 11 | Omega sends the itinerary to Traveler as soon as the travel is approved w/in 24 hrs.<br>*48 hours of departure time. Try virtual.com | ✓               | ✓              |               |                            | ✓                    |
| 12 | Traveler prints out e-confirmation and brings with him/her on travel. Planner provide the approved authorization to traveler.        | ✓               | ✓              |               |                            |                      |

|    | <b>When training is involved</b>  | <b>Traveler</b> | <b>Planner</b> | <b>AT / AO</b> | <b>Signing Authorities</b> | <b>GovTrip Omega</b> |
|----|---|-----------------|----------------|----------------|----------------------------|----------------------|
| 13 | Employee includes OALM Training Nomination form and a print out of the course, adds the CAN# and gets supervisor and director signature. These signatures mean “agreement as long as funds are there.”                  | ✓               |                |                |                            |                      |
| 14 | Employee sends hard copy package to Planner / AT / AO   | ✓               | ✓              |                |                            |                      |
| 15 | AO checks training request and sends front page and dollar amount to Financial Coordinator for funds availability.  | ✓               | ✓              |                |                            |                      |
| 16 | Financial Coordinator stamps “funds available,” ensures CAN# is correct, and returns training package to AO. Financial Coordinator. May stamp and scan it and send it back electronically.                              |                 |                |                | ✓                          |                      |
| 17 | AO or AT enters nomination into NIHITS / LMS, which obligates the funds. If training is external, AO registers employee and pays with credit card (See purchasing process; this expense goes into NBS to be reconciled) |                 |                | ✓              |                            |                      |
| 18 | AO prints confirmed nomination and sends it to the employee. If external, AO ensures that vendor sends a confirmation email to employee.  |                 |                | ✓              |                            |                      |

See next page for “When the traveler returns...”

|                |                 |                |                |                        |                            |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|
| <b>Legend:</b> | <b>Traveler</b> | <b>Planner</b> | <b>AO / AT</b> | <b>GovTrip / Omega</b> | <b>Signing Authorities</b> |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|

|    | <b>When traveler returns....</b>   | <b>Traveler</b> | <b>Planner</b> | <b>AO<br/>AT</b> | <b>Signing<br/>Authorities</b> | <b>GovTrip</b> |
|----|--|-----------------|----------------|------------------|--------------------------------|----------------|
| 19 | Traveler completes travel voucher for expenses and attaches all original receipts within 3 to 5 days business days of return from trip.  | ✓               |                |                  |                                |                |
| 20 | Traveler must have receipts for transportation, hotel, rental car and other expenses over \$ 75  | ✓               |                |                  |                                |                |
| 21 | Traveler sends voucher and original receipts to Planner.   | ✓               |                |                  |                                |                |
| 22 | Planner checks to ensure receipts are legible, reviews receipts to make sure they are compliant with Federal Travel Regulations (FTR), creates voucher from authorization, scans and uploads documents into GovTrip. |                 | ✓              |                  |                                |                |
| 23 | GovTrip sends an email to the traveler to certify the voucher  |                 | ✓              |                  |                                |                |
| 24 | Traveler certifies the voucher or returns it with comments; voucher goes to AO/AT electronically   | ✓               |                |                  |                                | ✓              |
| 25 | If there are any issues, AO / AT investigates; works with the employee to correct them and amends in GovTrip   |                 |                | ✓                |                                |                |
| 26 | Electronic notification goes to AO   |                 |                |                  |                                | ✓              |
| 27 | AO does final review and approves expenses in GovTrip  |                 |                | ✓                |                                |                |
| 28 | Accounts Payable reimburses employee within 3-5 business days  |                 |                |                  | ✓                              |                |
| 29 | AO files voucher and authorization in the Travel file for that group   |                 |                | ✓                |                                |                |
| 30 | AO electronically archives travel order and voucher  |                 |                | ✓                |                                |                |

|                |                 |                |                |                        |                            |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|
| <b>Legend:</b> | <b>Traveler</b> | <b>Planner</b> | <b>AO / AT</b> | <b>GovTrip / Omega</b> | <b>Signing Authorities</b> |
|----------------|-----------------|----------------|----------------|------------------------|----------------------------|

# Appendix A: Travel Request



## TRAVEL REQUEST FORM

### INSTRUCTIONS FOR TRAVELER:



|  |               |  |  |
|--|---------------|--|--|
| Name:  |               |  | NIH ID #:  |
| Office Address/Bldg/Room   | Office Phone: | Fax :  | Travel Planner Name &<br>Admin Tech Name & Phone<br>AO Name & Phone                        |
| Dates and Locations of Travel  |               | Begin Date of Travel:  | End Date of Travel:  |
| Arrival Date:  | Destination:  | Departure Date:  | Annual Leave Dates:  |
| Arrival Date:  | Destination:  | Departure Date:  | Annual Leave Dates:  |
| Are you eligible to earn Compensatory Time for Travel (CTT): <input type="checkbox"/> Yes <input type="checkbox"/> No<br>(The hours earned for CTT are not to exceed 8 hours for each Domestic and 12 hours for each International Travel) |               |  |  |
| <u>DESCRIPTION OF TRAVEL PURPOSE AND TYPE:</u>   |               |  |  |
| Trip Type: Site Visit <input type="checkbox"/> Training <input type="checkbox"/> (If more than one type is chosen, please provide dates for each) occurrence   |               |  |  |
| <u>TRANSPORTATION</u>  |               |  |  |
| <b>Mode of Primary Transportation:</b>   |               |  |  |
| Airline Ticket:                      Is this a contract flight? Yes <input type="checkbox"/> No <input type="checkbox"/> If no, justification (Required):  |               |  |  |
| Train:   |               |  |  |
| POV Total Mileage Estimate (State POV origin and destination):   |               |  |  |
| <b>Other Mode of Transportation:</b>   |               |  |  |
| Rental Car:                      Justification (Required):   |               |  |  |
| GSA Vehicle:                      Justification (Required):  |               |  |  |
| Taxi:  |               |  |  |
| Parking:   |               |  |  |
| Public Transportation:   |               |  |  |
| <b>Addition Travel Expenses:</b>   |               |  |  |
| TMC Fees:  | TAV Fees:     | Domestic Lodging Tax:  | Checked Baggage Fees:                      Internet Fees:                      Misc. Fees: |
| Phone Calls (Minimum 1 night lodging @ \$5.00 per day):  |               | Laundry/Dry Cleaning (Minimum 4 nights lodging @ \$10.00 per night): |  |
| <b>Airline/Flight Information:</b>   |               |  |  |
| Preferred Airport Codes:   |               | Preferred Airline:   |  |
| Preferred Departure Time (First Day of Travel):  |               |  |  |
| Preferred Departure Time (Last Day of Travel):   |               |  |  |
| <b>Train Information:</b>  |               |  |  |
| Preferred Stations:  |               |  |  |
| Preferred Departure Time (First Day of Travel):  |               |  |  |
| Preferred Departure Time (Last Day of Travel):   |               |  |  |
| Will Traveler return to residence after midnight? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, justification (Required):   |               |  |  |

**REGISTRATION FEE**

Please indicate if registration fee has been paid and reference that document type and number.

If yes, amount \$000.00 Due Date:

If meals and/or lodging are included in registration fee, specify dates and whether Breakfast, Lunch, or Dinner or Lodging is provided?

**LODGING**

Is Conference Rate Required? Yes  No  If yes, justification (Required):

Is an Actual Expense Authorizations (AEA) required? Yes  No  If yes, justification (Required):

Hotel Reservations Needed? Yes  No  If no, justification (Required):

Hotel Preference #1

Hotel Preference #2

Hotel Preference #3

**ACCOUNTING INFORMATION** Are you utilizing another IC's CAN? Yes  No  If yes, please include an email from the sponsoring IC approving use of IC's funds with travel request form.

Project Name (CAN): or Project Number: OC Code: SREA Impact ID: (if applicable)

**SPONSORED TRAVEL** Yes  No  If yes, please complete section below and include copy of letter form and official duty invitation.

1. Name and Address of Sponsor:

1a. Sponsor Contact Person's Name & Phone Number

In Cash  
In Kind

Portions of travel being paid by Sponsor: Hotel \$ Meals \$ Airfare \$ Registration Fees \$ Check if fee waived

2. Name and Address of Sponsor:

2a. Sponsor Contact Person's Name & Phone Number

In Cash  
In Kind

Portions of travel being paid by Sponsor: Hotel \$ Meals \$ Airfare \$ Registration Fees \$ Check if fee

**INTERNATIONAL TRAVEL**

Request for Notification of Foreign Travel (NFT) to be submitted to Fogarty? Yes  No

In Country Contact Information

Point of Contact and phone number

Hotel address and phone number

**TRAVEL CARD-CASH ADVANCE**

Do you require exemption from the use of the official Government travel card? Yes  No

If yes, justification (Required): Traveler has not traveled more than 5 times in a year; therefore does not have a Government credit card and has requested not to receive a cash advance.

Would you like to request a cash advance for this travel? (Only available to non-Government travel cardholders) Yes  No

*ATM cash advance may be taken, not to exceed the greater of: the estimated out-of-pocket expense of trip, \$300.00 per day or \$600 per week.*

**FIRST CLASS/OTHER PREMIUM CLASS**

Do you require First Class or other Premium Class transportation tickets? Yes  No

If yes, justification (Required) and NIH 1500 is attached:

**FOR USE BY AO ONLY**

Budget Limitation: \$

**NOTES:**

Please provide all supporting documentation.

If you need additional space for the itinerary or sponsor screens please include a separate sheet with additional information.

**ADDITIONAL COMMENTS:**

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Signature of Recommending Official \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Signature of Budget Official \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

COMPLETED FORM SHOULD BE FILED WITH TRAVELER'S OTHER TRIP DOCUMENTATION.

# Appendix B: Travel Voucher

## TRAVEL VOUCHER FORM

Name: \_\_\_\_\_

Trip Location(s): \_\_\_\_\_

Departure Date: \_\_\_\_\_ Return Date: \_\_\_\_\_

Expenses: *List all business expenses paid by personal funds – transportation tickets, lodging, taxis, local transits, registration fees, POV mileage, parking, rental car, tolls, phone calls, baggage, etc. Attach receipts to this form and return to your Travel Planner.*

| Date | Expense Description | Amount (\$) | Receipt?<br>Yes/No | Payment Method <ul style="list-style-type: none"><li>• <i>Personal</i> (Personal Credit Card or Cash)</li><li>• <i>Travel Card</i> (Gov. issued Travel Card)</li><li>• <i>Sponsored Personal</i> (Sponsor reimbursing)</li><li>• <i>Sponsored Travel Card</i> (Sponsor reimbursing)</li><li>• <i>Sponsored In-Mind</i> (Sponsor provided)</li></ul> |
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