
GUIDE TO UNIVERSITY TRAVEL

REQUESTING TRAVEL AND TRAVEL EXPENSE REIMBURSEMENT

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USS CUSTOMER SERVICE CONTACT

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All USS staff have access to all USS email accounts to provide optimum coverage.

USS aims to provide the highest level of service possible to campus.

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TRAVEL PROCESS OVERVIEW

1. Determine Funding Source
2. Shared Services completes Travel Request in Protrav
3. Travel arrangements and paying registration and airfare
4. Travel reimbursement (after trip)

Determine your source of funds (MFK/MFKs)

Create a folder for
tracking purposes



You might have more than one
source of funding (mfk).



Do you have a startup fund or
professional development account?
You can see them online 24/7, see the
green box below.



Did you get an email regarding an
award or request to travel on behalf of
CON? *The \$ amount & mfk should be
listed.*



**View your accounts in UI Self-
Service** <https://hris.uiowa.edu> (if
applicable). On left menu: 'Business &
Financial Systems' link, Header: "Data,
Reports, & Dashboards", 'Electronic
Financial Reports (EFR) Portal' link.

Options for Travel Funds (if you do not have startup or professional development accounts)



There are several options to request funds for conference travel.



Fill out [application](#) for Faculty Services Dev. funds (send to Brenda Van Dee)



Request funds from [Teaching in Higher Education Travel Award](#)



International Travel – Request funds from [International Programs Travel Award](#)

TRIP REQUEST

Shared Services prepares and initiates trip request in the Protrav system

- Traveler submits template with the following information to uss-nursing@uiowa.edu:
 - Purpose of travel
 - Destination
 - Departure / return dates of travel
 - Any personal travel dates
 - Traveler contact information (optional)
 - Conference weblink (or agenda, if available)
 - College of Nursing account to charge (or MFK)
- USS will create the trip and submit the form to Workflow. The form will route to the traveler's workflow inbox first and then supervisor/admin for final approval. Please review details for accuracy.
 - Workflow completion is required prior to traveling or paying for travel expenses.

Reasons for a trip request

Protects you in case of accident or illness while traveling

Provides information about your whereabouts in case of an emergency

Required in order to pay expenses and/or reimburse you!

Travel requests should be completed through workflow prior to departure or paying , this includes in-state travel as well

Paying for Registration, there are two options

1. Registration can be charged to USS pcards. Contact USS to set up at time to use their pcard. You will need the link to the conference registration.
2. Register on your own and be reimbursed after the trip.

Booking Airfare, 2 options

1. It is recommended that you use the University's preferred travel agent Destinations Unlimited (DU) to book your airfare.
 - Contact information can be found here:
<https://duagency.com/uiowa-travel/>
 - Inform DU to contact Shared Services for pcard payment.
2. Purchase your own ticket. Travel expenses will be reimbursed only after trip has been completed.

Airfare info to have ready when contacting Destinations Unlimited



Need your name as it appears on
your driver's license



Date of birth



Phone number for emergency's only



Departure day/time and return
day/time



City of departure and destination
city



Where you prefer to sit on the plane



Flight options will be sent to you to pick
the best flight times that work best for you.

Booking Lodging

Let USS know if you have questions when booking your hotel

Book room at conference selected hotel

If conference hotel is full, check for conference offered alternative hotels

If no alternative hotels available, lodging should be reasonable and meet business needs

Notes on shared expenses

When sharing a hotel room, separate receipts, if possible

When one individual pays for other person(s) sharing the room, the individual paying should claim the full amount. Provide the other traveler's name and USS will split the expense on the TEV.

Travelers should not reimburse each other.

The person not paying should claim no hotel expense.

When the room is shared with a colleague from another institution, that person's name and affiliation should be noted in the comments section.

Ground Transportation: Mileage

- **Mileage is reimbursed if your personal vehicle is used for UI travel.**
 - **Mileage rates differ depending on distance**
 - **Google maps will be used to verify miles driven**
 - **Gasoline is not reimbursed**

Fleet Services Vehicle

Contact USS with the following information:

- Date(s) of service (pickup/drop off times)
- Destination
- Drivers - names and number of drivers
 - Driving records will be checked
 - Valid drivers license required (license number)
- Account that will be paying

Fleet Services Vehicles

Pick up at Fleet Services (or
Motor Pool) on the end of
Harrison Street



Can leave your personal car
with a lot permit in parking
lot adjacent to Motor Pool



Gasoline credit card in the
glove box

Ground Transportation, during travel

- **Shuttle, taxi, Uber, Lyft or train provide receipts whenever possible (only business-related travel will be reimbursed)**
- **Provide dates of service and points of travel**
- **Include tips**

Car Rental



Use the University's contracted vendor for car rental- National/Enterprise.

[Enterprise link](#) for booking



Employees are expected to use this contract to obtain sufficient insurance coverage



Must be an Economy/Standard sized car



Provide justification for the use of a Rental Car

Meals Departure



- On day of departure, you must leave prior to:
- 6 a.m. to claim breakfast
 - 11 a.m. to claim lunch
 - 5:30 p.m. to claim dinner

Meals Return



On day of return you must arrive home after:

- 8 a.m. to claim breakfast
- 1 p.m. to claim lunch
- 7:30 p.m. to claim dinner

Documentation for Travel Expense Vouchers

Allowable Expense	Receipt/Documentation Required
Conference/Workshop Registrations	Registration form or other conference materials that verify the amount charged (to pcard or out-of-pocket) and specify what is included in the registration. The documentation should also specify which meals, if any, were included.
Airfare (Including exchange fees and travel agency service fees)	Itinerary provided by the travel agency at the time of booking that shows routing, dates, and class of service.
Hotel Deposits	Housing form, email or other documentation from the hotel or housing bureau that verifies the amount of deposit required and charged.
Lodging	Final Check out folio, showing an itemization of all nightly room charges, taxes and other business-related expenses
Meals while in Travel Status	Actual meal costs, up to the per diem amount for that destination are allowed. Alcohol is not allowed in travel-status meals. Meals provided by the conference cannot be claimed for reimbursement.
Rental Cars and gas for rental car	Final itemized receipt given upon return of car, showing an itemization of all charges, including daily/weekly rate, refueling charges, taxes, etc. The rental agreement given at the time of rental is not sufficient.
Other Ground Transportation Rail, shuttle service, etc.	Rail—itinerary or receipt given by travel agency at time of booking. Shuttle service—receipt given at time service is provided (unless charge is posted in advance of service).
Individual Meals in Travel Status	No receipt required if individual expense is under \$75.00
Airline Baggage Fees	No receipt required if individual expense is under \$75.00
Taxi/Shuttle	No receipt required if individual expense is under \$75.00
Gasoline for Rental Vehicle	No receipt required if individual expense is under \$75.00

AFTER THE TRIP: REQUESTING TRAVEL EXPENSE REIMBURSEMENT

Traveler sends an email (or uses Protrav Mobile App) to send the following information to Shared Services (uss-nursing@uiowa.edu):

- Trip dates/destination (or trip number if available) and specific out of pocket expenses as incurred and with required supporting documentation.
- List of all expenses occurred out of pocket:
 - Mileage – total miles traveled round trip.
 - Meals – Out of pocket **actual** meal costs. Note meals included at conference.
 - Include departure time and return time if you submit meal reimbursements
 - Other expenses: hotel, car rental, baggage tips, airfare, etc. if applicable
 - Documentation required to support expenses should be attached to the email, if app was not used.

USS staff:

- Will create a travel expense voucher (TEV) in a timely fashion, verify correct documentation is attached and correct MFK and iacct, and expenses are in compliance with UI policy.
- Will submit the TEV to workflow, routing first to the traveler for verification of expenses and then proceeding through normal departmental workflow approval.

PROTRAV MOBILE APP

- Try the new ProTrav Mobile App exclusively for USS customers
- Take pictures of receipts with your phone and they will send directly to your USS representative!



open [this link](#) on your iPhone (this is **NOT** an Apple Store app)

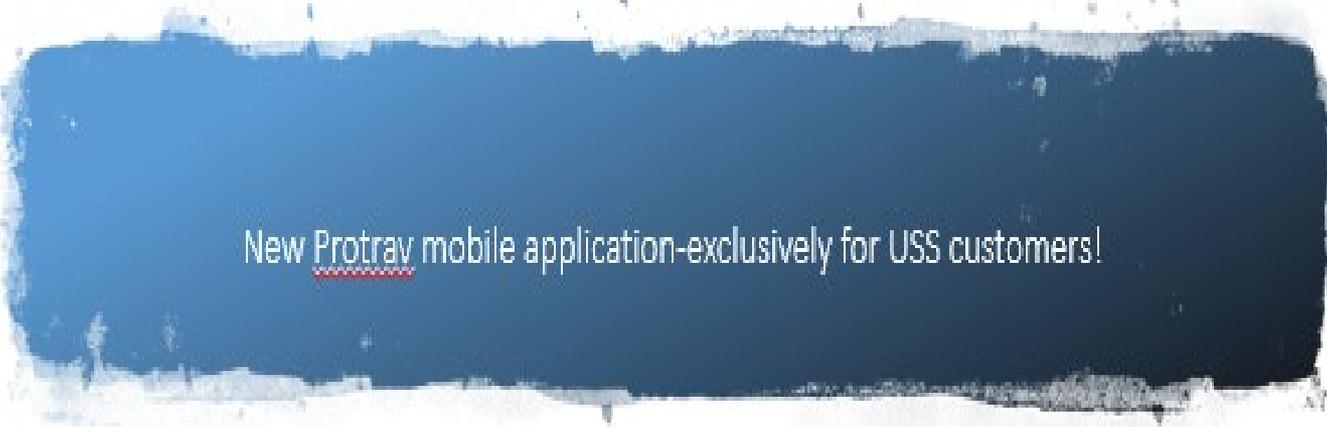


[click here](#) to download from the Google Play store

USS Protrav Mobile App

The logo consists of a dark gray square background. In the center is a white circle with a thin gray border. The text "USS Protrav Mobile App" is centered within the white circle.

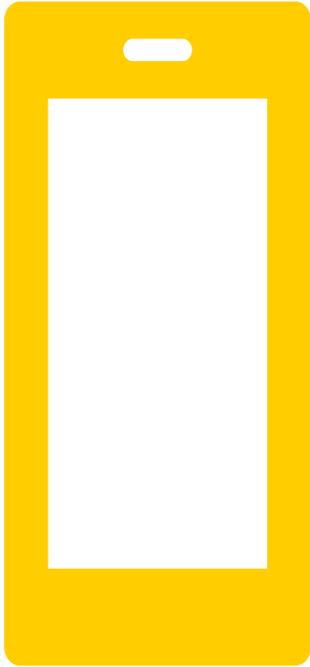
USS Protrav Mobile App



New Protray mobile application-exclusively for USS customers!

Take a picture of your receipts and they will automatically be emailed to your USS representative-no need to remember their email!

Text message USS with your out-of-pocket expenses!



Getting Started: Android

→ The app can be downloaded from this link:

<https://play.google.com/store/apps/details?id=edu.uiowa.fbis.protrav>

→ Launch the app and tap Register Device (lower right corner of the screen)

- After registration is complete, you will have access to all functions of the application

Getting Started: Apple

Open this link in your phone to view instructions and download the app:

<https://protrav.bo.uiowa.edu/net/Content/mobile/dl.html>

This is NOT in Apple Store

Click here to
download
the file



ProTrav Mobile Companion

Download

[Version for apple devices](#)



Getting Started: Apple

→ Remaining steps:

- When you launch the app and the “Untrusted Enterprise Developer” dialog appears, click Cancel.

This step adds Device Management to Settings.

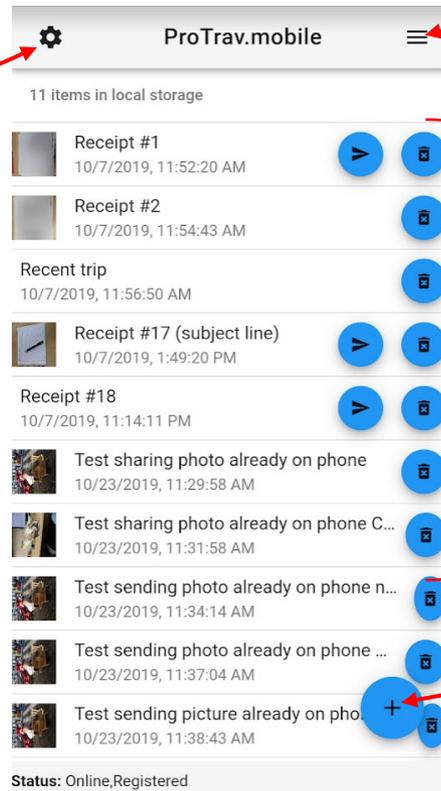
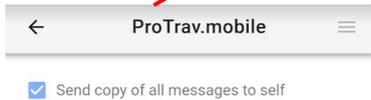
- Tap Settings > General > Device Management.

Note: If profiles are installed on your device, the setting is called Profiles & Device Management.

- Tap organization to change settings
- In the dialog that appears, tap Trust
- *Note:* If you are not connected to the internet, a “Not Verified” message appears. Connect the device to the internet and tap the Verify App button.
- Open the app and tap Register Device (lower right corner of the screen)
 - After registration is complete, you will have access to all functions of the application

Main Menu

Tap wheel and select option to send a copy of all messages to yourself



Menu bar

Receipt pictures and messages are saved here. The arrow buttons indicate messages that have not been sent to USS. Tap the arrow button to send.

Tap here to take a picture of your receipts

Main Menu

Menu bar

The screenshot displays the ProTrav.mobile application interface. At the top, there is a settings gear icon and the text "ProTrav.mobile". Below this, it indicates "11 items in local storage". The main content area lists several items, each with a small thumbnail image, a title, and a timestamp. The items are:

- Receipt #1 (10/7/2019, 11:52:20 AM)
- Receipt #2 (10/7/2019, 11:54:43 AM)
- Recent trip (10/7/2019, 11:56:50 AM)
- Receipt #17 (subject line) (10/7/2019, 1:49:20 PM)
- Receipt #18 (10/7/2019, 11:14:11 PM)
- Test sharing photo already on phone (10/23/2019, 11:29:58 AM)
- Test sharing photo already on phone C... (10/23/2019, 11:31:58 AM)
- Test sending photo already on phone n... (10/23/2019, 11:34:14 AM)
- Test sending photo already on phone ... (10/23/2019, 11:37:04 AM)
- Test sending picture already on pho... (10/23/2019, 11:38:43 AM)

A context menu is open on the right side of the screen, listing the following actions:

- Send all unspent
- Delete all sent
- Delete All
- Add message

At the bottom of the screen, the status is shown as "Status: Online,Registered".

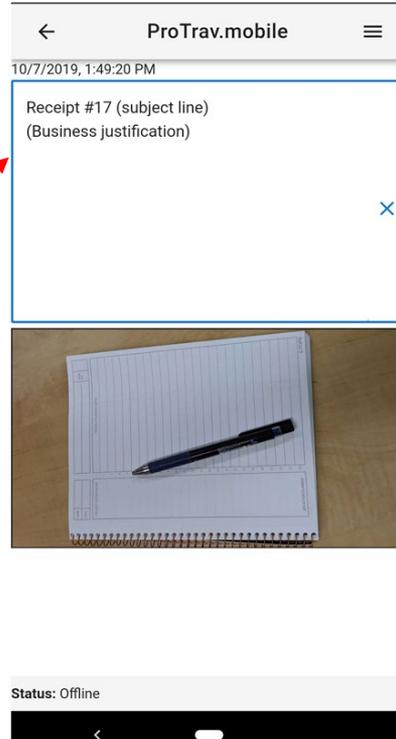
Message with Receipt



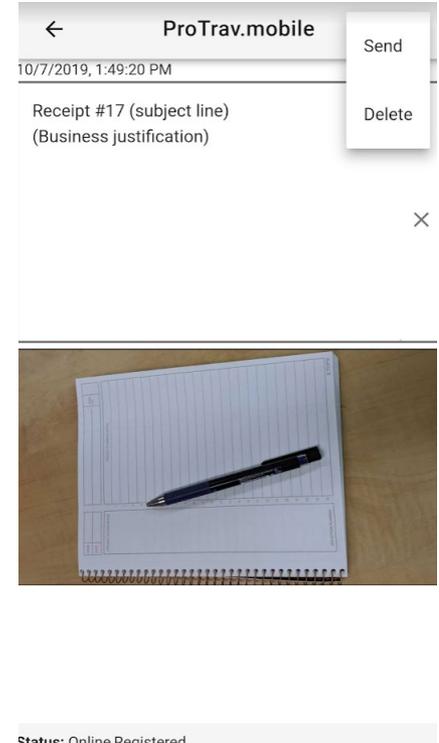
First line of your message will be the subject line

Following lines will be the message body

Tap to confirm



Status: Offline



Status: Online,Registered

Text Only Message

12:04 ProTrav.mobile

- Send all unspent
- Delete all sent
- Delete All
- Add message

3 items in local storage

Receipt #1
10/7/2019, 11:52:20 AM

Receipt #2
10/7/2019, 11:54:43 AM

Recent trip
10/7/2019, 11:56:50 AM

+

Status: Online,Registered

12:00 ProTrav.mobile

10/7/2019, 11:56:50 AM

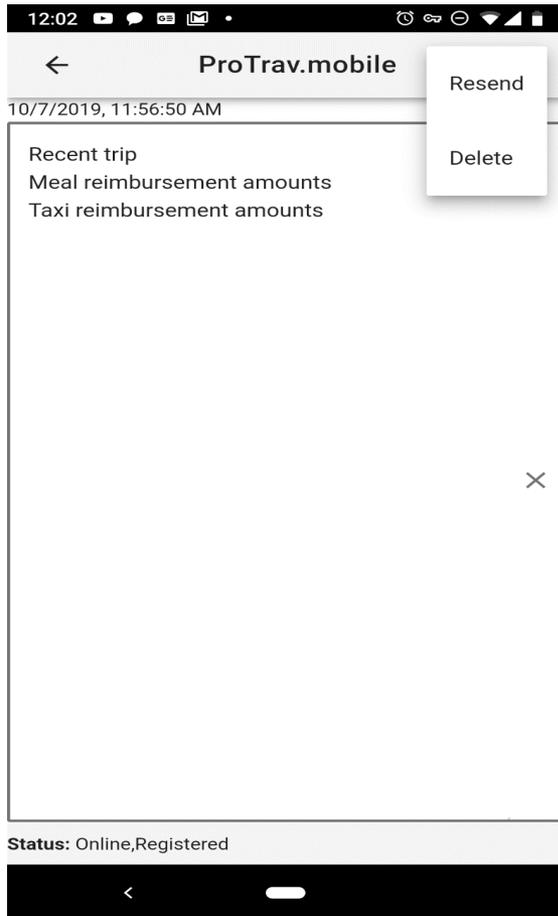
Recent trip
Meal reimbursement amounts
Taxi reimbursement amounts

Tap menu bar, then send

First line of your message will be the subject line

Following lines will be the message body

Tap here to create a message without a receipt attached



Resending messages

- From the main page, tap the message to be resent
- Tap the menu bar and select resend

CUSTOMER FEEDBACK

Our customers have the opportunity to escalate feedback regarding USS service quality to the following individuals:

Weston Marling

USS supervisor

Office: 335-3651 Cell: 319-400-5824

Email: weston-marling@uiowa.edu

Dani Weber

Director of Shared Services

Office: 353-2503 Cell: 319-530-2901

Email: danielle-f-weber@uiowa.edu

Debby Zumbach

Associate Vice President

Office: 335-3815 Cell: 319-551-0556

Email: deborah-zumbach@uiowa.edu

