COLLEGE OF HEALTH SCIENCES
OVERNIGHT TRAVEL WORKFLOW

EMPLOYEE

Prior to Travel:

1. Department Administrative Assistant (AA) completes a Travel Authorization form.
   - Include source of funding and robust business purpose and employee & supervisor signatures
   - Send Travel Authorization form to CHS-BUSINESS-ORDERS@uky.edu and CC Financial Analyst

2. Financial Analyst takes information and creates a Trip Number using the travel database.
   - Shares Trip Number with Department Administrative Assistant
   - Financial Analyst will contact the Administrative Assistant to clarify any questions

3. Financial Analyst, Administrative Assistant, and Traveler coordinate to arrange:
   - Event registration
   - Flight
   - Rental car/personal car information
   - Lodging
   - Notes on trip (special situations)
   - If completed by traveler or AA - receipts must be submitted through CHS-Business-Orders@uky.edu with Trip Number referenced.

Upon Return:

4. Department Administrative Assistant completes a Travel Authorization form.
   - AA fills out a CHS Request for Travel Reimbursement form
   - AA makes notes on any deviation in travel plans
   - AA submits receipts and CHS Request for Travel Reimbursement form to CHS-BUSINESS-ORDERS@uky.edu and CC Financial Analyst
   - Financial Analyst will contact the Department AA to clarify any questions

5. Financial Analyst enters travel information into Concur in the travelers profile.
   - Upon completion, Financial Analyst submits the Concur travel documents to traveler for approval (via Concur)
   - Traveler will review for accuracy. If approved, the form is routed to their supervisor for approval (via Concur)
     - If not approved, traveler will coordinate with the Financial Analyst to revise.
   - Supervisor will review for accuracy. If approved, the form is routed to the CHS Business Officer for approval (via Concur)
     - If not approved, supervisor will coordinate with the Traveler & Financial Analyst to revise.
   - CHS Business Office will review for accuracy. If approved, the form is routed to UK Accounts Payable for reimbursement (thru Concur)
     - If not approved, Business Officer will coordinate with the Traveler & Financial Analyst to revise.
STUDENT

What is the funding source that is paying for the trip?
- If the funding is block funding or a student travel award then they must travel as a student.
- If the funding is grant related then the travel is typically as an employee. See Employee travel.

Is it related to the student's own project or faculty member project?
- If it's the student's project then they will typically travel as a student.
- If it's the faculty's project then they will typically travel as an employee. See Employee travel.

Post-Doctoral Scholar?
- Typically considered as an Employee. See Employee travel.

Post-Doctoral Fellowship?
- Typically funded by a Training Grant and considered as a student.

Prior to Travel:

1. Department Administrative Assistant (AA) submits a CHS online order form and attaches a Payment on Behalf of Student form.
   - If expenses are to be paid by UK procard, no additional steps are required prior to submission of online order form.
   - If the expense(s) were paid by student's personal funds, itemized receipts showing amount and form of payment must be submitted. Include a special note that we are to reimburse prior to travel due to financial hardship to the student.

2. Financial Analyst reviews and approves order.
   - Financial Analyst notifies the Department AA the order has been approved
   - If not approved, Financial Analyst will contact the Department AA to clarify any questions

3. Financial Analyst, Department AA, and student coordinate to arrange.
   - Event registration
   - Flight
   - Rental car/personal car information
   - Lodging
   - Notes on trip (special situations)
   - If completed by traveler or AA - receipts must be attached to the online order or submitted through CHS-Business-Orders@uky.edu with order number referenced.
   - Student per diem is based on itemized receipts (no alcohol)

4. Student submits receipts to AA within two weeks of travel.
   - AA submits a CHS online order form and attaches a Payment on Behalf of Student form
   - For expenses paid by student's personal funds, itemized receipts showing amount and form of payment must be submitted.
   - Financial Analyst will contact the Department AA to clarify any questions

5. Financial Analyst creates and submits PRD for approval.
   - CHS Business Office will review for accuracy. If approved, the form is routed to UK Accounts Payable for reimbursement (thru Concur)
     - If not approved, Business Officer will coordinate with the Traveler & Financial Analyst to revise.
   - Once approved, it routes to UK Accounts Payable for processing
   - UK Accounts Payable will review and approve with payment sent to student via check
   - If rejected, an automated email will inform the Financial Analyst. Issues will be resolved and a new PRD will be submitted.