Employee Travel Procedures Guide

This step-by-step guide provides an outline for the documentation and information that is needed at each stage of your travel process. For additional Information or questions regarding your travel please contact: bs-travel@kyrene.org.

Step 1 – Complete and submit Travel Pre-Approval Workbook

- Travel Pre-Approval Workbook may be obtained from **T:\BUSINESS SERVICES\Travel Forms** or by visiting https://www.kyrene.org/about-kyrene/departments/finance/travel

- Complete all applicable sections in the Travel Pre-Approval Workbook to its entirety. (Using the information from your agenda)

- Print Travel Pre-Approval Form tab from workbook, obtain supervisor signature, save in PDF format and submit to bs-travel@kyrene.org

- Submit completed Travel Pre-Approval Workbook via email to bs-travel@kyrene.org (*Prior to submitting the Travel Pre-Approval Workbook to bs-travel@kyrene.org, please ensure you have completed all applicable sections in the workbook and attach conference agenda and travel quote(s) to your email. Incomplete forms will be returned to sender).*

- Once the Travel Pre-Approval Workbook has been emailed to bs-travel@kyrene.org, one of our team members will review your workbook and notify you by email when it is appropriate for you to proceed with your travel requisitions.

Step 2 – Enter Travel Requisitions

After Travel Pre-Approval Workbook has been approved by Finance, you may proceed with your travel requisitions. Confirm your conference registration requisition is submitted and approved prior to travel. Additionally, a requisition for travel reimbursement must also be approved by Finance.

Conference Registration Requisition Requirements:
Please include the bulleted information below in the description section of your conference registration requisition.

- Name of conference/seminar/workshop/ training
- Date of the conference/seminar/workshop/ training
- Location, city and state.
- Attendee(s) Name(s)
- Agenda/Brochure/email/screenshot/ quote must be attached
- **Complete Conference Agenda** must be attached if overnight – this ***must*** include information on how to register, meals offered and conference hotels and rates.

Step 2 – Entering Travel Requisitions (*Continued*)

Travel Reimbursement Requisition Requirements

Please include the bulleted information below in the description section of your travel reimbursement requisition.

- Traveler's name
- Event name
- Travel dates and location
- Signed Travel Pre-Approval Form
- What is being reimbursed (food, mileage, etc.)
- Travel Pre-Approval Workbook
- Conference Agenda

(If the employee is not showing in the vendor drop down in ERP Pro, please contact our purchasing team. Please email the employee's name, address and cell phone number to KSDPurchasing@kyrene.org).

Prior to Traveling, you must have the following:

☐ **Fully approved conference registration Purchase Order**

☐ **Fully approved travel reimbursement Purchase Order**

Step 3 – Travel to Destination

Step 4 - Welcome Back!

- Upon return, traveler must complete and submit the Travel Expense Claim Form within two (2) calendar months of travel, including zeroed out receipts for hotel, airfare and transportation (if applicable). Submit to the Finance Dept, Attn: Accounts Payable.

- Please ensure all necessary bookings (flights, accommodation, transportation, registration) are completed as per the approved Travel Pre-Approval Workbook. Only allowable reimbursable amounts will be reimbursed to the employee as authorized by the Finance Department in the Travel Pre-Approval Workbook.