

Travel Workshop for Employees

UNIVERSITY OF HAWAII

COLLEGE OF NATURAL SCIENCES

DEAN'S OFFICE

FEBRUARY 2023

REV 03.30.2023

Agenda

Roles and Responsibilities

Justification/Purpose

Supporting Documentation: Justification, itinerary, payment confirmations

Per Diem: Meals & Incidental Expenses, and Lodging

Submittal Deadlines: sign up for ePayments

Guidelines and Helpful Reminders: Allowable vs Not Allowable Expenses

Resources / Contacts



UH Administrative Procedure (AP) 8.851

This presentation is based on the policies and procedures written in the University of Hawaii Systemwide Policies and Procedures Information System (PPIS) for Employee Out-of-State and Intra-State Travel.

<https://hawaii.edu/policy/?action=viewPolicy&policySection=ap&policyChapter=8&policyNumber=851>

Roles & Responsibilities

Traveler/ Preparer:

Provides all necessary documentation for Travel Request and Travel Completion and ensures information is correct and accurate and that the account has funds for travel.

Supervisor/PI/ Dept Chair:

Authorizes that the purpose of the trip benefits UHM, that the employee has permission to travel, that the employee's workload is covered, and that the account to charge is correct.

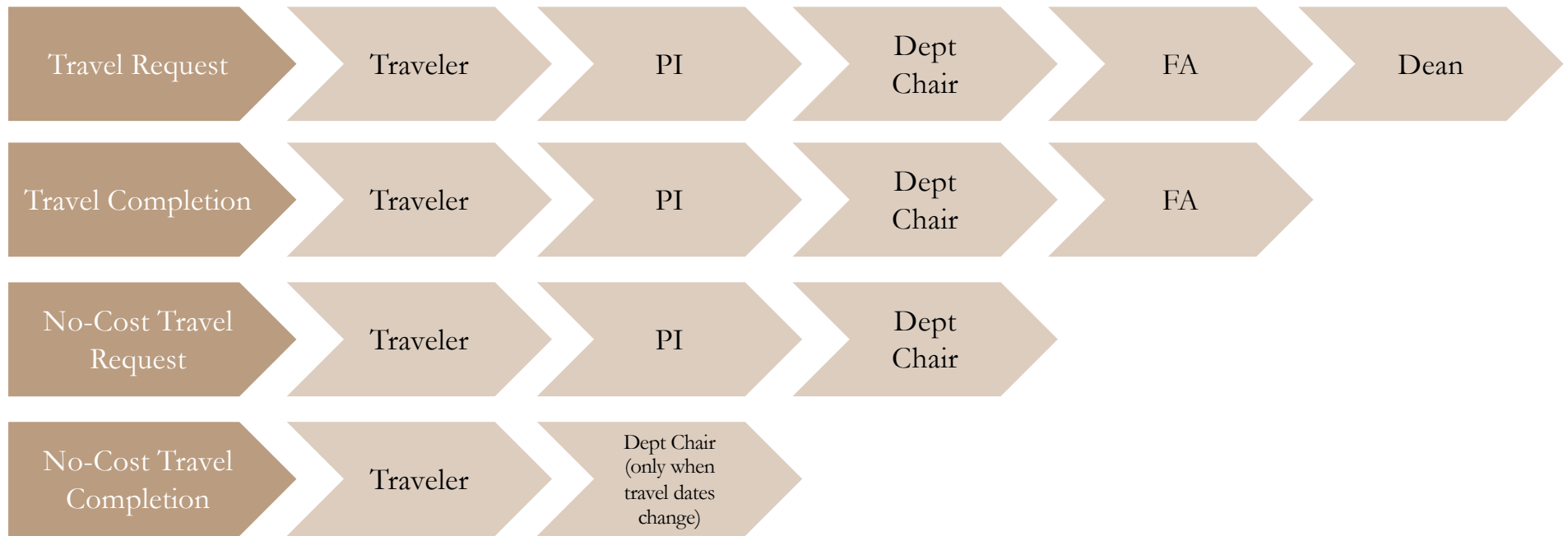
Fiscal Administrator:

Authorizes that the funds are available and that policies and procedures are followed.

Dean:

Authorizes travel.

Roles & Responsibilities: Approval Flow



Justification/Purpose

WHO, WHAT, WHEN, WHERE, WHY?

Examples:

[Grad student] is traveling to Berkeley, California to participate in the General AntiParticle Spectrometer (GAPS) integration from July 11-15, 2023.

Dr. Veronica Bindi is traveling to Geneva, Switzerland to attend the Alpha Magnetic Spectrometer (AMS-02) general meetings with collaborators at CERN (European Organization for Nuclear Research) from September 10-17, 2023.

Justification/Purpose

Coverage of duties: List duties that must be covered during your absence and identify who will be covering them for you.

Signature Authority for Grad Chairs and Dept Chairs: Provide a memo to your Department (cc to Dean's Office) that states who your signing authority will be during your absence.

- PeopleSoft
- KFS
- PCDOs
- UH Leave System

Supporting Documentation

1. Invite
2. Event Information
3. Confirmations and Receipts

Supporting Documentation: Invite

Invitation Letter or Email: Required when no publicly advertised event function is taking place (such as a collaboration or project meeting). Follows the Justification/Purpose rules (WHO, WHAT, WHEN, WHERE, WHY) plus the account and per diem info.

- Name of traveler, reason for travel, per diem that will be allowed (M&IE flat rate per day vs FAR, lodging costs), list all expenses that will be covered by the project, dates and location of function (no acronyms)

EXAMPLE 1: [Grad student / travel to a meeting /collaboration project \(Invitation Letter\)](#)

Dear [Grad Student],

This letter authorizes your travel to Berkeley, California from June 12, 2023 to June 16, 2023. The purpose of this trip is to participate in the General AntiParticle Spectrometer (GAPS) integration. I will reimburse your economy round trip airfare and ground transportation to and from the airport, hotel, and meeting sites. I will also give you a flat rate of \$50/day for per diem, which includes meals, incidentals, and lodging expenses. Remember to submit all your receipts upon completion of your trip.

Supporting Documentation: Invite

Invitation Letter/Email: Required when no publicly advertised event function is taking place (such as a collaboration or project meeting)

- Name of traveler, reason for travel, per diem that will be allowed (M&IE flat rate per day vs FAR, lodging costs), list all expenses that will be covered by the project, dates and location of function (no acronyms)

EXAMPLE 2: PI travel to meet with collaborators (email to Preparer)

I will be traveling to Geneva, Switzerland to meet with project collaborators from Sept 10, 2023 to Sept 17, 2023. The purpose of this trip is to discuss our research paper, supervise post-docs, test instruments, and participate in shifts. Please charge account 6XXXXXX for my economy round-trip airfare, taxi to and from airport, hotel, and meeting locations. I will take the full FAR for my per diem.

Supporting Documentation: Invite

Invitation Letter or Email: Required when no publicly advertised event function is taking place (such as a collaboration or project meeting)

- Name of traveler, reason for travel, per diem that will be allowed (M&IE flat rate per day vs FAR, lodging costs), list all expenses that will be covered by the project, dates and location of function (no acronyms)

EXAMPLE 3: PI travel to meet with collaborators (email to Preparer)

I will be traveling to Haleakala, Maui from Feb 8, 2023 to Feb 11, 2023 to survey a potential site for the new Neutron Monitor Instrument that will be located on the summit, and to assess the amount of work needed in preparation for construction. Please charge account 6XXXXXX for full M&IE, lodging, and airfare expenses.



UNIVERSITY OF HAWAI'I AT MĀNOA

Department of Physics and Astronomy

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Email: philipvd@hawaii.edu • Telephone: (808) 956-3719

October 17, 2022

Cory Gerrity
c/o 2505 Correa Rd
Honolulu, HI 96822

Dear Cory:

This letter authorizes your travel to the Space Sciences Lab, Berkeley, CA, from Oct 27, 2022, to Nov 12, 2022. The purpose of this trip is to participate in the GAPS integration. I will reimburse your r/t airfare to Berkeley, CA on a receipt basis. The receipt can be submitted for reimbursement as soon as you submit your receipt showing that the payment was made. I will also reimburse your lodging and ground transportation on a receipt basis (upon completion of the trip). In addition, I offer \$50 per day for meals and incidental expenses.

Yours Sincerely,

A handwritten signature in black ink, appearing to read "Philip von Doetinchem".

Philip von Doetinchem
Professor

Supporting Documentation: Event

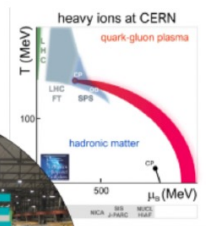
Name of meeting, conference, workshop, seminar, event function (NO ACRONYMS)

- PDF or screenshot of online event brochure/workshop flier/seminar announcement/agenda
- PDF or forward emails to your preparer
- Provide PDF of advertised registration fees for events that require a fee for registration in addition to your registration confirmation.
- PDF or screenshot of detailed event agenda



Dates and location of function: (NO ACRONYMS)

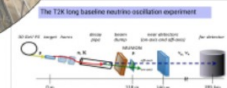
Travel Itinerary: Flights, train tickets, lodging, etc



NA61++/SHINE: Physics opportunities from ions to pions



Physics opportunities from ions to pions



14-17 Dec 2022
CERN
US/Hawaii|timezone

Enter your search term

Please register before November 25!

- Overview
- Call for Abstracts
- Participant List
- Registration
- Hotel information
- Wireless internet

This workshop will focus on development of the physics program for the NA61/SHINE detector in the years after CERN's Long Shutdown 3.

Starts 14 Dec 2022, 22:00
Ends 17 Dec 2022, 04:40
US/Hawaii

CERN
774/R-013
[Go to map](#)

Eric Daniel Zimmerman
Seweryn Kowalski

[Booking form NA61 SHINE 12.2022.docx](#)

Organizing committee:



Registration

This event is open to everyone from all backgrounds whether you are a practicing physicist or if you have an interest in the subject and would like to know more. Please read our [terms and conditions](#) and [code of conduct](#) prior to completing your registration. We invite you to register online by 23 February 2023.

REGISTER ONLINE

Registration Fees

IOP Member	£50
Non-Member	£75
IOP Member (Online)	£15
Non-Member (Online)	£50

Cancellation Policy

All cancellations must be made in writing. Full details can be found in our [terms and conditions](#). Submission of a registration is regarded as a firm booking (subject to availability) and acceptance of these terms and conditions.

Payment of Fees

In order to ensure that it complies with the Payment Card Industry Data Security Standard ("PCI DSS") and for the protection of its members and others, the Institute of Physics will only accept credit and/or debit card payments online through RBS WorldPay secure payment server. All payments must arrive by **23 February 2023**. After that day, we reserve the right to cancel all unpaid registrations. [Please see alternative payment methods here](#).



Note About Event Registration Fees

In some cases, a preparer cannot access information about registration fees. If this is the case, you must login to your profile and print to PDF the registration info and include it as supporting documentation.

2023 PhysTEC Conference

March 3-4, 2023, in Las Vegas, NV, at Harrah's Las Vegas

Ready to Join Us for the Event?

Register Now

Enhance Your Institution's Physics Teacher Education Program

Join us for the nation's largest meeting dedicated to the education of future physics teachers, held March 3-4, 2023 in Las Vegas, Nevada. The meeting will also include on-demand content, virtual watch parties, and discussions.

PhysTEC Conference 2023 will feature workshops on programmatic best practices and departmental problem-solving, discussions on current issues relevant to the physics teacher educator community, and networking opportunities.



Join us for the nation's largest meeting dedicated to the education of future physics teachers! The 2023 PhysTEC Conference will be held in Las Vegas with a hybrid experience.

Hybrid registration includes virtual and in-person events.

Virtual registration includes virtual events only.

Event Dates:

- Feb 25 – Online pre-conference event
- March 3-4 – In-person conference
- March 4-18 – Session watch parties and Q&A
- March 18 – Post-conference wrap-up session

When and Where

Start Date	3/3/2023 11:00 AM EST
End Date	3/4/2023 8:30 PM EST
Location	Las Vegas/Hybrid
City	Las Vegas
State/Province	Neveda

[Log In to Register](#)

In-Person Events

Thursday, March 2

- Registration: 3:00 – 5:30 p.m (PT), 6:00 – 8:30 p.m (ET)

FRIDAY, MARCH 3, 2023

SATURDAY, MARCH 4, 2023

FRIDAY, MARCH 3, 2023	
TIME	SESSION DETAILS
7:30 a.m. – 8:30 a.m. PST	Registration
8:00 a.m. – 9:45 a.m. PST	Open Plenary
9:45 a.m. – 10:00 a.m. PST	Transition
10:00 a.m. – 11:15 a.m. PST	Session 1A, 1B, 1C
11:15 a.m. – 11:45 a.m. PST	Networking Break
11:45 a.m. – 1:00 p.m. PST	Session 2A, 2B, 2C
1:00 p.m. – 1:15 p.m. PST	Transition
1:15 p.m. – 2:45 p.m. PST	Lunch
2:45 p.m. – 3:00 p.m. PST	Transition
3:00 p.m. – 4:15 p.m. PST	Session 3A, 3B, 3CC
4:15 p.m. – 4:30 p.m. PST	Transition
4:30 p.m. – 6:00 p.m. PST	Poster Session
6:30 p.m. – 7:30 p.m. PST	Networking Dinner

TESTING GRAVITY 2023

18-21 JANUARY 2023, SFU HARBOUR CENTER, VANCOUVER, BC, CANADA

[Home](#)

[Program](#)

[Register](#)

[Travel Info](#)

[Local Info](#)



For your travel plans reference, the pre-workshop school will start at 9 am on Wednesday, January 18th. The workshop will start at 9 am on Thursday, January 19th and end on Saturday, January 21st. Conference dinner is planned for evening of Friday, January 20th. Arriving the evening before the meeting starts is probably the best way to schedule your travel, and you can stay a few extra days for a weekend in the city or on ski slopes. Further information about local attractions will be posted on local info page.

Getting to Vancouver:

Vancouver International Airport ([YVR](#)) is well connected to major airports in Asia and Europe and cities throughout Canada and USA. Excellent deals, particularly from Europe, can often be found on holiday airlines, such as [Air Transat](#) and [Thomas Cook](#). The best option for getting from YVR to the city is via [Sky Train](#).

Alternative Airports:

Vancouver Harbour Flight Centre ([CXH](#)) is a seaplane terminal located within a 10 min walk from SFU Harbour Centre. An exciting option for people arriving from the University of Victoria, assuming the weather collaborates.

Bellingham International Airport ([BLI](#)), across the US border, is about 85 km (53 miles) away from downtown Vancouver. Flying to BLI can be an inexpensive option if travelling from cities on the west coast of the US.

Seattle-Tacoma International Airport ([SEA](#)) is 250 km (153 miles) away from downtown Vancouver. Flying to SEA can be a more economical option, even after taking the cost of the rental car into account.

By Car:

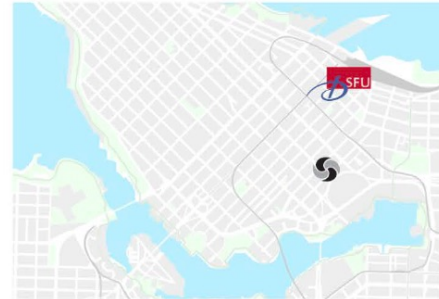
If you are coming from US by car, border crossing times depend on the time of the day. 10-20 mins wait is normal during non-peak times, but can easily be an hour if you happen to venture at the wrong time. You can get an idea about the crossing time statistics on various websites.

By Ferry:

BC Ferries runs several regular [ferry lines](#) connecting Vancouver Island to the Mainland. The closest terminal to downtown Vancouver is Tsawwassen. Although Horseshoe Bay terminal is not much further away, it is located on the North Shore. Connection over Lions Gate Bridge could be problematic during rush hour.

Workshop Venue:

The meeting will take place in the [SFU Harbour Centre](#), located near the waterfront in the downtown Vancouver core. It is easily accessible from the airport and is surrounded by a vibrant neighbourhood.



Accommodations:

Delta Vancouver Suites:

550 West Hastings St. (across the street, 220 CAD/night+17.5% tax)

Last day to book: November 24th, 2022. To book online, use [this weblink](#). Alternatively, you can call Marriott Reservations at +1(844)254-5048 and provide the code "SPG" to get the above rate.

Sandman Hotel Vancouver:

180 West Georgia St. (10 mins walk, 119 CAD/night+17.5% tax)

Book using [this weblink](#) no later than January 3rd, 2023, to get the special rate. If booking via the generic hotel website or by phone, provide the code "TG2023".

Supporting Documentation: Expenses

Receipts: Confirmations will not be advanced or reimbursed. Receipts must show:


- Method of payment
- Confirmation of payment
- Amount charged
- Name of card holder if paid via credit card

Foreign Transactions: Must provide your redacted credit card statement that shows:

- Amount charged in USD
- Name of cardholder and last 4 digits of card
- Oanda.com currency converter may be used for cash transactions

Example of redacted statement showing conversion rate

07/22	HOTEL DIVANI CARAVEL VAS ALEXAN		24.62
	07/26 EURO	Lodging Tax	
	24.00 X 1.025833333 (EXCHG RATE)	Receipt titled: Divani Caravel Hotel	



Per Diem aka M&IE and Lodging

Federal Allowable Rate (FAR): Max rate for per diem for any location

<https://www.travel.dod.mil/Travel-Transportation-Rates/Per-Diem/Per-Diem-Rate-Lookup/>



LOCATION (1)	County and/or Other Defined Location (2)	Seasons (Beg-End)	Max Lodging	Local Meals	Proportional Meals	Incidentals	Maximum Per Diem	Effective Date
ACTON	LOS ANGELES COUNTY	10/01-10/31	182	69	43	5	256	10/01/2022
ACTON	LOS ANGELES COUNTY	11/01-12/31	168	69	43	5	242	10/01/2022
ACTON	LOS ANGELES COUNTY	01/01-09/30	182	69	43	5	256	10/01/2022

Travel Dates: 06/12/22 to 06/15/22



Lodging \$182/night

Meals \$69/day + Incidentals \$5/day = \$74/day for M&IE

Total per diem \$182 + \$74 = \$256/day

M&IE Per Diem

You cannot claim meal per diem for each meal that is included in any event or lodging charges.

- Breakdown: Breakfast 20%, Lunch 30%, Dinner 50% of total Meal per diem/day

If Traveler chooses a meal as an added cost to the cost of the event, then that meal shall be deducted from the Meal per diem.

- Example: Breakfast is included at an additional cost of \$12/day with event registration. So, 20% of the FAR Meal is removed from the daily per diem for each day that the meal was purchased.
 - If FAR Meals is \$69/day, then 20% is \$13.80 for breakfast.

Calculating M&IE with the Quarter Day Calculator

- <https://www.hawaii.edu/trvl/calculatorDisplay.do>

Note About M&IE Per Diem

You will receive 100% of your M&IE, but it is at the discretion of your FA on how they want to distribute your M&IE. You may receive only 50-75% in your advance, and the remainder upon approval of your completion.

Receipts are not needed.

Advances cannot be received prior to 30 days of travel or less than 10 days of travel.

Note About M&IE Per Diem

Same-day Inter-island travel M&IE: \$20 (taxable income)

Lodging Per Diem

Excess lodging (rate is over the FAR for lodging): Must be approved before you leave and must include justification such as: two business price quotes from the same area and same day, or if the lodging is listed as the preferred site for the event, or when safety is a concern, or if this hotel is closest to the meeting site, or if taxes and fees made up for the excess amount.

Always choose single-occupancy room rate, unless double-occupancy room rate is less than or equal to single-occupancy room rate (you must provide quotes as supporting documentation).

Example:

FAR Lodging = \$118/night. Your hotel is charging \$250/night, an excess of \$132/night. You must pull costs of rooms at 2 other similar rated hotels (quotes) in the same area that show that your hotel is the cheapest rate OR if the cost is not the cheapest rate, you must provide a justification of why you are choosing that hotel.

Lodging Per Diem

Sharing lodging with another Traveler

- Lodging cost will be reflected on both Traveler's request documents, with reference to both travel documents.
 - "Traveler A, travel doc #, is sharing a room with Traveler B, travel doc #."
- Upon checkout, one Traveler will pay the bill.
- In the travel request comments, name who is planning to pay for the lodging upon completion.
 - "[Name of Traveler 1] will pay the bill for the shared lodging and [Name of Traveler 2] will reimburse [Name of Traveler 1] directly upon completion of travel."

Note About Lodging Per Diem

In-State and Domestic: Lodging FAR is before taxes and fees

Foreign: Lodging FAR includes taxes and fees

Reservation Confirmation vs Reservation Receipt: Confirmations that don't show proof of payment or proof of deposit shall not be reimbursed or advanced. Receipts that show proof of payment, method of payment, name of card holder, and amount paid can be reimbursed or advanced.

When are Quotes needed?

Airfare: When there are both business and personal days in the same trip. Provide a business-only airfare itinerary at the same time you booked your trip to ensure a fair comparison. The cheaper airfare will be reimbursed. Per diem will only be paid for the business-only itinerary.

Lodging: When the hotel costs exceed the FAR except when the hotel is the preferred lodging location for an event.



TIP: When making PDFs/screenshots of online quotes, make sure all details are listed such as taxes and other associated costs that make up the total cost (what does the price include?).


Transportation FAQs

US Airlines: Must book flights on US owned airlines only unless you qualify for the Fly America Act exemption

Economy Fare: Only economy will be reimbursed. Must provide a fare quote if Traveler purchases a non-economy fare.

Airfare is cheaper if traveler arrives earlier or returns later: Extra days will be counted as personal days (no per diem).

Refundable Economy Tickets: Allowed if refundable ticket is less than or equal to the same non-refundable ticket. Quotes shall be provided.



Transportation FAQs

Rental Cars: Justification is always required for vehicles other than economy. Insurance will not be reimbursed unless there is no option to opt-out (such as with international agencies). Keep all gas receipts for reimbursement.

The Collision Damage Waiver charge is permitted for Out-of-State Travel but is not permitted for rentals in the State of Hawai'i (Refer to A8.265 – Specialized Purchase Procedures; A8.400 – Risk Management). When renting vehicles within the State, employees should decline all insurance options. In case of an accident, provide the rental agency with a copy of the explanatory [Memo](#). Click on "[Car Rental Accident Memo](#)".

Transportation FAQs

Using airline credit to purchase tickets: Must include the original ticket that was purchased and any cancelled travel documentation.

Uber/Lyft/Taxi/Metro/Bus/Train: Tips are not reimbursed. Note on your receipts FROM and TO destination for each ride.

Baggage Fees: 1 allowed check-in bag can be reimbursed. Justification required for additional bags.

Layovers: Travel shall be economical and direct, with the least amount of stopovers. Cheaper flights with more layovers will incur additional M&IE and/or lodging – and it is less economical and less direct.

Boarding passes: Required anytime there are flight time changes that affect M&IE calculations. And required if there will be no other travel expenses except for M&IE, as proof that Traveler went on the trip. Screenshots are acceptable.

Allowable Expenses (receipts and/or statements required)

All allowable expenses must be approved BEFORE travel (Request and Advance).

- Transportation (air, train, ground/rental), gas for rental car, parking fees
- Internet (WiFi, phone cards, etc)
- Lodging
- Certificates required for travel (birth, health, identification such as Passport or Visa)
- Currency exchange fees, Traveler's check fees

Allowable Expenses (receipts and/or statements required)

All allowable expenses must be approved **BEFORE** travel (Request and Advance).

- Baggage (no advance, reimbursed by receipt only)
- Fax
- Event fees, telephone fees
- Business-related purchases (materials and supplies)
- Toll fees
- Estimated expenses are okay

Disallowed Expenses

Frequent Flyer Fee

Airfare insurance

Car rental insurance and premiums (except when no option to opt-out such as out-of-state rentals)

Traffic fines, towing charges, portorage fee (bellboy, doorman, etc), trans-ocean travel by surface ship

Gifts, tips, laundry

Personal purchases and entertainment

Submittal Deadlines

Travel Request and Advance: 14 days before travel (must sign up for ePayments)

Travel Completion: 10 days upon return



Note about advances: cannot be submitted more than 30 days before travel. Advances cannot be paid if there are previous travel documents that are still outstanding.

Earlier is always preferred! Even if you do not have all your travel plans solidified, it is best to notify your department administrators and/or FAs of your upcoming travel.

Guidelines and Helpful Reminders, etc

Package Deals: make sure it's itemized; Traveler can only claim what's not already covered.

Receipts: Label, circle, and annotate, especially TO and FROM locations on taxi receipts, include the dates on your travel doc. Translate all foreign receipts to English.



Taxi
July 22, 2022
Hotel to Airport
(Athens, Greece)

Guidelines and Helpful Reminders, etc

Comments: Explain unusual circumstances and write out all calculations to show how you got your numbers

Always spell out acronyms

Sign up for ePayments: <http://www.hawaii.edu/epayment/>

Guidelines and Helpful Reminders, etc

Non-employees (Fellows): still have to complete travel requests and completions

Travel Agencies: Can be used to book air, lodging, and/or car rental via PO



Remember: You are creating a story for someone with no knowledge of your travel!

Resources

UH Administrative Policies and Procedures (for Travel AP 8.851):

<https://hawaii.edu/policy/?action=viewPolicy&policySection=ap&policyChapter=8&policyNumber=851>



Resources

UH eTravel Website: www.hawaii.edu/etravel

NEED HELP?

- [FAQ Storyboard | Text Version](#)
- [Quick Reference/Tips](#)
- [Training Schedule](#)
- [Travel APM \(A8.851\)](#)
- [Travel Guide for Reimbursement](#)
- [Travel Reimbursement Checklist](#)



RESOURCES

- [Allowable Rates, Memos, etc.](#) ←
- [Federal Allowable Rates \(FAR\) Site](#)
- [International Travel](#)
- [Fly America Act](#)
- [OANDA Currency Converter](#)
- [Hardcopy Forms](#)
- [About eTravel](#)



Resources

RCUH Website: www.rcuh.com

Your Department Administrators and FAs are available to help you!

- **HEPG Preparers:** Vannida Phommachanh (vannida@hawaii.edu) and Caitlin Murphy (murphyca@hawaii.edu)
- **Physics Preparer:** Cassidy Tabata (cmlum@hawaii.edu)
- **FAs:** Liane Murai (lianekm@hawaii.edu), Janice Kam (janicetk@hawaii.edu), and Joy Magarifuji ([magarifuj@hawaii.edu](mailto:magarifu@hawaii.edu))