Faculty / Staff Travel Procedure - Aug 2022

1. All SDC Faculty / Staff need to create a Global Travel - Traveler Profile
   
   a. Allows for easier travel coordination by SDC Admin: Traveler Profile includes this info for travel agent to book itinerary
      i. Name as matches passport / driver’s license
      ii. Seat preferences assigned
      iii. Mileage plan entered so miles applied to each itinerary
   
   b. Link to Global Travel - Traveler Profile
      https://www.globaltrav.com/corporate/business_traveler_profile/
   
   c. Email sdc.admin@wsu.edu when this has been completed; we will keep a list so that we can communicate appropriately with the Global travel agent when booking airfare

2. Approval for ALL Faculty / Staff Business Travel is required prior to Admin Staff purchasing Airfare or processing Conference Registration
   
   a. Approval is obtained by creating a Spend Authorization (SA) in Workday
      i. SA is a pre-travel budget & requires all estimated expenses as a separate line item
         1. Airfare
         2. Conference Registration (If Applicable)
         3. Lodging
         4. Rental Car, Taxis etc. Listed as “Other Transportation”
         5. Per Diem Meals
   
   b. SA approval process routes automatically in Workday to SDC Admin, Director and Admin Manager for each approval level, so start this process early
   
   c. Link to SA Instructions:
      https://confluence.esg.wsu.edu/display/WKB/Create+Spend+Authorization
   
   d. Email Wes Underhill or Kate Barnes if you cannot get errors in system to go away, please include screenshots of error messages

3. Airfare - purchased on the SDC Central Travel Account, so there is no expense to the traveler

4. Conference Registration Fees - paid on SDC Admin Purchase Card, so there is no expense to the traveler
5. Business Travel expense reimbursement

a. Within 5 business days of returning from Business Travel, create an Expense Report (ER) in Workday
   i. Receipts are required for all expenses other than per diem meals

b. Link to ER Instructions:  
   https://confluence.esg.wsu.edu/display/WKB/Create+Expense+Report

c. Email Wes Underhill or Kate Barnes if you cannot get errors in system to go away, please include screenshots of error messages

d. Travel reimbursement usually take two weeks from the time the ER has had the final SDC approval; these times can vary depending on the # of ERs in the WSU Travel Workday queue
   i. If you have not received your reimbursement within two weeks of the ER being submitted, email sdc.admin@wsu.edu so we can research the issue

Note: Please discuss student led trips with Admin Manager prior to creating a spend authorization, each trip will likely require a few adjustments to the process.

Tips: If you start a SA or ER and press “save for later” as you got stuck along the way; DO NOT create a new SA or ER... this causes multiple problems

Search for the one you created by one of two methods

1. Write down SA or ER # when you press “save for later” and when ready to continue with process, type into search field, edit & continue (KB demo)

2. Use Find Spend Authorization or Find Expense Report search tool in Workday (KB demo)