FSU | DIVISION OF UNDERGRADUATE STUDIES

Travel Procedures & Guidelines

Division of Undergraduate Studies

For UGS faculty and staff requesting to travel on official University business

Purpose and Scope

This guide summarizes the Undergraduate Studies (UGS) internal process for requesting, booking, and documenting University travel. FSU-wide policies, Florida law, funding restrictions, and applicable sponsored-project or Foundation requirements take precedence. Contact the UGS Fiscal Manager or designated travel representative with questions.

Submission Timeline:

Travel Type	When to submit
Standard requests	Submit the UGS travel request form **at least 4 weeks** in advance.
Complex requests	Submit **at least 6–8 weeks** in advance. International travel has additional advance registration and Concur requirements. Cash Advances for group travel are required to be at the Travel Office's level of approval in Concur at least 2 weeks from the travel start date.
Initial review	Allow at least 1-2 business days for your request to be reviewed. Additional documentation or review may take longer.

Important: Do not book travel or incur travel-related expenses until the required Concur Travel Request approvals are complete.

Steps to Request & Complete Travel:

1. Plan and request approval before booking

1. Discuss the trip with your supervisor and identify the business purpose. Include the conference or meeting name, dates, location, and how the trip supports University business.
2. Complete the current UGS Request to Travel form at least **four weeks** before the travel start date. Include departure and arrival times for the full trip, including travel to and from the airport or rental-car location. Provide realistic estimates for anticipated expenses and identify any personal travel dates.
3. Attach available supporting information, such as the conference website or agenda, registration details, hotel information, airfare options, rental-car estimate & pickup/dropoff locations, and any required justification. The UGS Fiscal Manager will help determine the appropriate funding and assign to a UGS Travel Representative to assist with processing.
4. Follow the applicable Concur workflow. **The Travel Request must be fully approved before booking travel or incurring travel-related expenses.** Do not assume that submitting the UGS form alone completes FSU approval.

International travel: Start early. Foreign travel must be registered through FSU in advance, regardless of funding source. The travel delegate may prepare the request, but the traveler must personally submit it in Concur and complete the required international travel attestation.

Group travel: Start early. Complete Group Travel Roster and send to your UGS Travel Representative.

Cash advances are not encouraged, but are available case-by-case, when use of the travel card is difficult or unavailable, or group or extended foreign travel is involved. Travel requests will need to be submitted in Concur by the cash advance recipient, as acknowledgement they are receiving the funds specified.

Guest Travel: Will require Guest Traveler Profile form for individuals not currently employed by Florida State University.

Failure to follow the guidelines above may result in the request being delayed, denied, or not processed within the expected timeframe.

2. Information to provide before arrangements are made

- Conference or meeting: website link, event name, registration information, agenda if available, and hotel information.

- Hotel: requested dates and room preferences, if relevant. Provide a justification for rates above $225 per night when requested by UGS. The $225 guidance is not a universal cap for every trip; additional restrictions apply to certain state-sponsored events and funding sources.
- Airfare: traveler's name as required for booking, date of birth, frequent-flyer number if applicable, travel dates, and seating preferences. Do not purchase airfare independently before the required approval and booking steps.
- Personal travel added to a business trip: provide the personal-travel dates and dated fare comparisons showing the cost of the business itinerary without personal travel versus the itinerary that includes personal travel. Flight comparisons need to be completed in Lightning. Save the comparisons when the booking is made and include them with the expense documentation.
- Rental car: requested dates, estimated rate, and business reason if a vehicle larger than compact class or a non-contracted vendor is needed.
- Personal vehicle: provide an estimated route/mileage when planning the trip if requested. Actual mileage must be documented in Concur using the applicable mileage expense type; keep a mileage log when required.

3. Book travel using FSU-approved methods

Airfare must be booked through the Booking module in Lightning or through FSU's contracted travel agency, Collegiate Travel Planners (CTP), using the approved process. Choose the most practical and economical option for the University, generally using a direct route and economy/coach fare. Contact the UGS travel representative before making an unusual booking or if a preferred option is not available through the standard process.

Keep confirmations and receipts. University travel policies still apply even when an employee pays out of pocket.

4. Important travel rules

- Airfare: Purchase non-refundable main cabin, economy, coach class tickets. If changes are needed due to cancellations or delays, please contact CTP or make the changes directly in Lightning. Do not make changes directly with the airline at the airport.
- Lodging: select a reasonable single-occupancy room and retain the itemized hotel bill showing the amount paid or a $0 balance and the method of payment. Personal charges, such as guest accommodations or entertainment, are not reimbursable.
- Lodging rates above $225: be prepared to provide a justification for a single room rate above $225 per night. For certain meetings or conferences organized or sponsored in whole or in part by a Florida state agency or university, special lodging limits may apply to specified funding sources. Ask the UGS Fiscal Manager before booking if the rate exceeds $225 or the funding source is unclear.
- Rental cars: use an FSU-contracted rental vendor when practical and reserve a compact vehicle via rental agency portals. Larger vehicles require a business-related justification explaining the need, such as the number of passengers, equipment, or cargo being transported. For domestic rentals through a contracted vendor, do not purchase optional insurance. If a non-contracted vendor is necessary, consult FSU guidance regarding required coverage. Keep the itemized rental receipt; retain fuel receipts when seeking reimbursement for rental-car fuel.
- Meals: meal reimbursement is governed by FSU rates and eligibility rules. Meal receipts generally are not required, but note any meals provided by the conference or host on the agenda or conference schedule. You cannot be reimbursed for meals if a meal has been provided by the conference/meeting, etc.
- Mileage and local transportation: use the applicable Concur expense type and document the business route. Necessary and reasonable ground transportation, parking, and tolls may be reimbursable under FSU rules. Receipt requirements differ by expense type; every Travel Card (T-Card) charge requires a receipt.
- Personal expenses: do not charge personal travel or personal expenses to a University Travel Card. If business and personal travel are combined, preserve the required comparison fares and confirm how the costs should be handled.

5. During the trip

- Keep itemized receipts and booking confirmations, especially for lodging, rental cars, baggage fees, and T-Card charges.
- Keep the conference agenda or schedule and mark meals provided by the conference, host, or hotel.
- Notify the appropriate UGS travel contact about significant itinerary or cost changes and retain documentation explaining the change.
- Keep personal expenses separate. Do not assume an expense is reimbursable simply because it was incurred while traveling.

6. After returning: submit receipts and documents

Please send supporting documents as soon as possible, ideally within two business days of returning, to help complete the Concur Expense Report.

Possible receipts/documentation may include:

- ☐ Itemized hotel bill showing the room charges, amount paid or $0 balance, and method of payment—not only an incidental receipt.
- ☐ Ground transportation receipts, such as taxi, rideshare, shuttle, subway, or other transit, when required.
- ☐ Airport parking and baggage-fee receipts, when applicable.
- ☐ Rental-car itemized receipt and fuel receipts when fuel reimbursement is being claimed.
- ☐ Conference agenda or schedule with meals provided noted.
- ☐ Registration receipt and other business-travel receipts or supporting documentation, as applicable.
- ☐ Personal-travel airfare comparisons captured when booking, if business and personal travel were combined.

☐ Mileage documentation or log, if applicable.

If a TCard holder paid for the conference registration and/or airfare in advance, the expense report may be submitted before the trip is completed.

Meal receipts are generally not required for meal allowance claims. Gas receipts are not required when claiming mileage for use of a personal vehicle; this is different from seeking reimbursement for fuel used in a rental car.

An Expense Report is required in Concur to reimburse eligible out-of-pocket travel expenses and settle Travel Card transactions. A travel delegate may help prepare the report, but the traveler must review and submit their own Expense Report in Concur. Keep original receipts until the report is fully processed.

Other Helpful Information:

Roles and responsibilities

Traveler / requester	Provides a clear business purpose, completes the UGS request, supplies booking details and supporting documents, follows the approval and booking process, retains receipts, and reviews/submits their Expense Report in Concur.
Supervisor / department approver	Reviews the business purpose and dates of travel and completes the required approval workflow.
UGS Fiscal Manager / designated travel representative	Reviews the request, coordinates UGS processing, helps identify funding and documentation requirements, and assists with travel/expense workflow as assigned.
Budget or cost-object approver	Reviews funding availability, allowability, estimated expenses, and supporting documentation in the applicable approval workflow.

Travel checklist

Before booking

☐ The business purpose, conference/meeting name, location, and dates are clear.

☐ The current UGS Request to Travel form is complete, including full travel times and estimated expenses.

☐ Conference/meeting, registration, hotel, airfare, and rental-car information are attached as available.

☐ Any personal-travel dates and required airfare comparisons are provided.

☐ Any lodging rate above $225 per night or other unusual expense has been flagged for review.

☐ The required Concur Travel Request approval is complete before booking or incurring travel expenses.

After returning

☐ Supporting documentation is sent to your designated travel representative ideally within two business days.

☐ The hotel bill is itemized and shows the payment method and final balance.

☐ Transportation, parking, baggage, rental-car, and other applicable receipts are included.

☐ The conference schedule identifies meals provided.

☐ Personal-travel comparisons and mileage documentation are included, if applicable.

☐ The traveler reviews and submits the Expense Report in Concur and keeps receipts until processing is complete.

Official FSU resources

FSU Travel Services — https://travel.fsu.edu/

Controller's Office — Travel Information — https://controller.vpfa.fsu.edu/services/travel/travel-information

Travel order of operations — Travel and booking — https://controller.vpfa.fsu.edu/services/travel/order-of-operations/travel

Travel order of operations — Expense Reporting — https://controller.vpfa.fsu.edu/services/travel/order-of-operations/expense

Air Travel and Lightning / CTP — https://controller.vpfa.fsu.edu/services/travel/travel-information/air-travel

Ground Transportation — https://controller.vpfa.fsu.edu/services/travel/travel-information/ground-transportation

Lodging — https://controller.vpfa.fsu.edu/services/travel/travel-information/lodging

Foreign Travel — https://controller.vpfa.fsu.edu/services/travel/travel-information/foreign-travel

Frequently Asked Questions — Travel — https://controller.vpfa.fsu.edu/services/travel/frequently-asked-questions

Questions about the UGS process should be directed to the UGS Fiscal Manager or designated UGS travel representative. For University-wide policy interpretation or Concur/Lightning assistance, contact FSU Travel Services at travel@fsu.edu.