Appendix C

International Travel Flow Chart

Individual Travel

Before you travel:

1. Research your travel destination:
   - Visit https://protect.iu.edu/travel site for the following traveler safety information:
     1. Insurance https://protect.iu.edu/travel/insurance
        1. Medex insurance card http://hr.iu.edu/benefits/basic.html
     2. US State Department warnings https://protect.iu.edu/travel/statedepartment
     3. Export control https://protect.iu.edu/travel/inspection
   - Visit IU Travel Site http://www.indiana.edu/~travel/index.shtml
     2. Pre-Travel Checklist http://www.indiana.edu/~travel/traveling/pretravel.shtml#outofstate

2. Take inventory of trip requirements and determine appropriate payment means:
   - Advance/Displacement Allowance/Custodial Fund/Out-of-Pocket
     1. Duration of trip and how to pay for lodging, per diem, etc.
     2. Paying non-employees (translators, travel guides, etc.) – PO/DV/Custodial Fund
     3. Communication needs (cell phone, phone cards, internet service, etc.)

Note: ATM Fees/Baggage Handling/Hotel cleaning tips, etc. are covered under your per diem allowance. Office and site equipment and supplies are not reimbursable through Travel. (Custodial Fund or out of pocket.)
3. Determine method of travel (air, personal car, rental car, method of travel to the airport, etc).

4. Obtain approval to travel from the Fiscal Officer or Department Chair. Create a new trip in Travel@IU. For instructions on creating a new trip, view the Out-of-State Authorization Tutorial. If any prepayments are required, be sure to specify the necessary details while creating the trip.

5. Enroll in the Safe Traveler Enrollment Program (STEPS)

6. If you do request a registration or one-night lodging deposit prepayment, provide supporting documentation to Travel Management Services. This is required before any prepayment checks can be processed.

7. When the authorization document is approved, a Trip Number appears on the traveler's Travel Activity page in the Travel@IU system. You can use this number to make the necessary reservations for this trip.

   - To charge airfare expense to a departmental account, you must provide the Trip Number to a Designated Travel Agency or online through Orbitz for Business.
   - To charge hotel expense to an IU departmental account, you must provide the Trip Number through the IU IU Hotels.com program. For instructions see How to Use Hotels.com.

8. Obtain appropriate travel documents (passport, visa, etc) with Passport Services.

9. Obtain all original receipts while traveling (food receipts are not necessary if per diem is being claimed).

**After the trip:**

10. Locate the existing trip on the Travel Activity page in the Travel@IU system, and click the green Request Reimbursement button. For instructions, view the Out-of-State Reimbursement Tutorial.

11. Add Per Diem information, mileage, and any other travel related reimbursable expenses to the Travel@IU trip document. Route the document for approval, and be sure to generate and print the Coversheet using the button provided on the confirmation page.

12. Attach original receipts and any other supporting documentation to the trip’s coversheet and either upload using the Electronic Receipt Submission (PDF) process or mail to the address provided on the coversheet.

13. Travel Management Services will process the reimbursement request and ensure that all travel was conducted in accordance with the University's travel regulations. When the receipts have been processed and the trip document has been approved, you will receive your reimbursement.

**NOTE:** Process the non-travel related expenses through the appropriate, predetermined channels. (Custodial funds, out-of-pocket DV, etc.)
Student Group Travel

Note: Student Group Travel is defined as a Faculty or Staff-led business travel that includes a group of 3 or more students

1. All of the above under “Individual” travel applies plus the following
   a. Trip must be registered with the Office of Overseas Study.
   b. Trip must be created in the “group leader’s” name in Travel@IU. All travel expenses will be paid by the group leader and claimed on the group leader’s trip in Travel@IU.
   c. Travel Advance may include expenses in addition to per diem and lodging, such as ground transportation, museum entry fees, etc.