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Effective Date:	10/27/2014	Replaces:	1.0
Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	PMO
Title:	Travel Request Process SOP		
Description:	This document is the standard operating procedure for the travel request process.		

Travel Request Process

Standard Operating Procedure

1. General Statement of Purpose
 - 1.1. The purpose of this document is to outline the process of how an employee requests and receives reimbursement for travel expenses.
2. Scope
 - 2.1. This document applies to all ISD employees who travel as part of their job.
3. Discipline
 - 3.1. Administrative Standards
4. Terms and Definitions
 - 4.1. Purchase Card (P-Card) – A form of credit card issued to designated state employees. The P-Card is used by the cardholder to make purchases of most types of goods and services necessary for official use of the state.
5. Instructions

Travel Request

- 5.1. An ISD employee requesting travel can access the OMES Travel Request Form at the following location: **J: Drive < Function < ALL ISD < Forms** or on the Process Library Website: <http://eclipse.omes.ok.gov/> under the ISD Operating Standards Discipline in the Forms Folder.
- 5.2. The employee will fill out the OMES Travel Request Form and give it to their Supervisor for approval. A scanned copy of the signed Travel Request Form must be forwarded to their designated Administrative Support Staff.
 - 5.2.1. The form must be signed by the direct Supervisor, Manager and Director.
 - 5.2.2. For travel within Oklahoma, or for travel out-of-state via automobile, the Trip Optimizer must be used to determine the lowest travel cost. The Trip Optimizer is located at: <https://www.ok.gov/dcs/calculator/index.php>
 - 5.2.3. If airfare is needed, the employee must obtain an estimate by going to the following website: www.concursolutions.com. The following information is needed to obtain an estimate:
 - Date and approximate time the employee will need to travel to their destination.
 - Date and approximate time the employee will need to return.
 - Name as it appears on the employee's driver's license.
 - Employee's date of birth.

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- Employee's cell phone number.
 - Any special items the Travel Agency will need to be aware of while booking the flight.
- 5.3. The Administrative Support Staff will then scan the signed form and forward it to the employee requesting travel and to the Division of Capital Assets Management (DCAM) Travel Office at the following email address: TravelRequests@omes.ok.gov
- 5.3.1. If airfare was requested, the Administrative Support Staff will request that the DCAM Travel Office book the flight.
- 5.4. If overnight reservations are required, the employee must make the reservations at a hotel that accepts state rates, or is the designated hotel for a training or conference. The employee must forward the hotel confirmation to the Administrative Support Staff.
- 5.4.1. The employee will only be approved for lodging if their trip is 60 map miles (one-way) or more, per the OMES Statewide Accounting Manual.
- 5.4.2. The state of Oklahoma utilizes the GSA Standard Per Diem and Lodging rates for each state. Refer to the GSA website at: www.gsa.gov then go to the Per Diem Rates link.
- 5.4.3. If using a designated hotel, the employee must include a copy of the documentation indicating the hotel is the designated hotel with their travel request.
- 5.5. The Administrative Support Staff will then forward the hotel confirmation to the DCAM Travel Office so the hotel bill can be transferred to the P-Card.

Travel Reimbursement

- 5.6. After the employee returns from their trip, they must submit their Travel Claim Form (also located at **J: Drive < Function < ALL ISD < Forms**, under the name "Travel reimb claim" or on the ISD Process Library website), along with their signed OMES Travel Request Form, agenda or itinerary and receipts for lodging, local transportation, etc. to the ISD Administrative Support Staff.
- 5.6.1. The date and time the employee left home/office and returned to home/office needs to be included with the receipts, etc. If the employee is claiming mileage, their vehicle license tag number must also be listed.
- 5.6.2. The Per Diem Table to be used for calculating the total Per Diem payable, is located at: **J: Drive < Function < ALL ISD < Per Diem Table.XLS**
- 5.7. The Administrative Support Staff will assure the claim is complete and correct. They will then send the claims to the employee's supervisor, manager, and director for signatures. When the Administrative Support Staff receives the approved Travel Claim, the claim is scanned and saved before sending to the ABS Accounts Payable Staff for reimbursement.
- 5.8. The employee will then be reimbursed by direct deposit.

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6. Roles and Responsibilities

- 6.1. ISD Administrative Support Staff – Receives the Travel Request Form and assures it is complete and accurate. They then scan the signed form and forward it to the DCAM Travel Office. Later, they will forward the hotel confirmation to the DCAM Travel Office so the hotel bill can be transferred to the P-Card. After the employee’s trip, the Administrative Support Staff will assure the employee’s Travel Claim Form is complete and accurate, attain the correct signatures, and send the claim to ABS Accounts Payable for reimbursement.
- 6.2. DCAM Travel Office – Receives the OMES Travel Request Form and will put hotel reservation costs on their Purchase Card.
- 6.3. ABS Accounts Payable – Receives the Travel Claim Form, the OMES Travel Request Form and all of the required documentation from the ISD Administrative Support Staff. The ABS Accounts Payable Staff then processes the claim for payment.

7. Limitation or Implementation Notes

- 7.1. Per Diem Rates and Mileage Reimbursement Rates can be found at: www.gsa.gov

8. References

- 8.1. Both the OMES Travel Request Form and the Travel Claim Form are located at the following locations: **J: Drive < Function < ALL ISD < Forms** or <http://eclipse.omes.ok.gov/> under **Disciplines < ISD Operating Standards < Forms**.
- 8.2. Trip Optimizer - <https://www.ok.gov/dcs/calculator/index.php>
- 8.3. Per Diem Table - **J: Drive < Function < ALL ISD < Per Diem Table.XLS**
- 8.4. OMES Statewide Account Manual - http://www.ok.gov/OSF/Comptroller/Statewide_Accounting_Manual/
- 8.5. Airfare booking – www.concursolutions.com