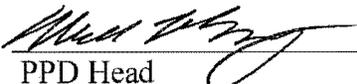


**PARTICLE PHYSICS DIVISION OPERATING MANUAL
REVIEW AND APPROVAL RECORD**

TRAVEL AUTHORIZATION POLICY

Prepared by  Date 4-6-12
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Approved by  Date 4/6/2012
PPD Head

TRAVEL AUTHORIZATION POLICY

INTRODUCTION

This document describes the responsibilities of PPD personnel who wish to travel off-site on business and the distribution of travel forms after signature.

DEFINITIONS

Travel: Any business travel off-site, other than material pick-up or delivery that lasts less than 90 days.

Travel Authorization and Cost Estimate Form: two-part online form (TAB 1-TA and TAB - Cost Est. Sheet) to be filled out before leaving on travel to receive approval for said travel.

Current online Travel Authorization Forms: <http://bss.fnal.gov/travel/forms.html>.

Particle Physics Division Domestic Travel: Elaine Phillips ext. 5160, Luz Jaquez, ext. 8720; WH8W, MS 208.

Particle Physics Division Foreign Travel Representatives: Luz Jaquez, ext. 8261; and Stephanie Schuler, ext. 4136; WH8W, MS 208.

RESPONSIBILITIES

As a reminder, travelers should also complete a PPD Absence from the Laboratory form.

Domestic Travel:

Traveler must fill out the online Travel Authorization Form, print it, sign it, and get their supervisor and department head to sign it. Traveler should also complete Estimated Costs Form and attach it to Travel Authorization. The department head's signature is always required to authorize the absence from the Lab site on business. If the travel is on a task code that belongs to a different department or division, the person with authority for that task code must also sign the Travel Authorization Form in the Funding Officer field. The form is then routed to the Particle Physics Division Office and signed by the Particle Physics Division Head or in his absence the Deputy Head.

The original form *then* is given back to the Traveler's Administrative Support person or Division Office will take to Fermilab Travel Office for ticket reservation if needed. It is a Laboratory requirement that all tickets must be purchased through the Fermilab Travel Office. The Travel Office will not make any arrangements without this form, nor will they make any arrangements until the traveler calls to give specific instruction on flights. The original Travel Authorization Form will remain in the Travel Office. If a travel advance is requested, the Travel Office will make a copy of the Travel Authorization form and send it to the Fermilab Accounting Office before the departure date.

Upon completion of the trip, the online Expense Voucher (Tab 2, 4, or 6) of the online Travel Authorization Form is filled out by the Departments Administrative Support and approved by the travelers' Department Head unless the Department Head is the traveler, in that case it comes to the Particle Physics Division Office for signature.

A Department Head traveling on his or her own task code must submit, the form plus receipts should be sent to Luz Jaquez who will grant final approval of the costs.

Foreign Travel:

Traveler must fill out two forms **regular travel 45 none sensitive, 55 sensitive and conference 60 days in advanced** of date travel starts: [1] Online **Travel Authorization Form**; [2] **Travel Cost Estimate** form. Follow instructions for each form. All Travel Forms are available from any Support Services/Administrative Support person, OR on-line: <http://bss.fnal.gov/travel/index.html>. Traveler's department head must sign **Travel Authorization Form**. If the travel is on a task code funded by a different division, then someone with authority on that code must also sign **Travel Authorization**. If the traveler is from a division/section other than the PPD, the forms must be signed by his or her division head. These forms are then routed to the Particle Physics Division Office and given to the Particle Physics Division Foreign Travel Representative who will make sure the forms continue on their path to approval.

If the traveler is taking any **personal vacation** during business which involves an itinerary which is different than the one required for the business, traveler must submit to Particle Physics Division Foreign Travel Representative **BEFORE** the trip two cost itineraries: one without vacation travel and another with vacation travel. Any costs in excess of business travel will be charged to the traveler.

Upon completion of the trip, an online **Travel Authorization Expense Voucher** is filled out (Tab 2, 4, 6 or 8) [within two weeks of return] by the traveler; the form is approved by someone responsible for that code, or in the case of a Department Head, by Luz Jaquez (MS208).

New foreign travel requests will not be approved by the Particle Physics Division Head until all paperwork from old foreign trips has been submitted to the Particle Physics Division Foreign Travel Representative.

The Particle Physics Division has two Foreign Travel Representatives: Luz Jaquez ljaquez@fnal.gov, MS 208, ext. 8261; and Stephanie Schuler, steph@fnal.gov, MS 208, ext. 4136.