

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 Expense Voucher Form: three-part form to be filled out before leaving on travel to receive approval for said travel. Current form: Rev 04/03 Stock No. 1335-0290.

DOE Form 1512.1 Request for Approval of Foreign Travel: Form needed for approval of foreign travel.

Estimated Costs Form: Form to tally domestic travel expenses.

Foreign Travel Cost Estimate Form: Form to tally foreign travel expenses.

Particle Physics Division Foreign Travel Representatives: Barb Kristen, WH8W, MS 208, ext. 3199; and Luz Jaquez, MS 208, ext. 8261.

RESPONSIBILITIES

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

Domestic Travel:

Traveler must fill out the top portion of the Travel Authorization Form, 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 budget code that belongs to a different department or division, the person with authority for that code must also sign the Travel Authorization Form. 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 pink copy of the form then is sent by the Division Office to the Fermilab Travel Office for ticket reservation. 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 is returned to the traveler. If a travel advance is requested, the yellow copy is sent by the traveler to the Fermilab Accounting Office two weeks before the departure date.

Upon completion of the trip, the bottom portion (Travel Expense Voucher) of the Travel Authorization Form is filled out by the traveler 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.

For a Department Head traveling on his or her own budget code, the form plus receipts should be sent to Barb Kristen who will grant final approval of the costs.

Foreign Travel:

Traveler must fill out three forms **45 days in advance** of date travel starts: [1] **Travel Authorization and Expense Voucher** Form; [2] **DOE Form 1512.1** "Request for Approval of Foreign Travel"; [3] **Foreign Travel Cost Estimate** form. Follow instructions for each form. Forms [2] and [3] above are available from any Support Services/Administrative Support person, OR on Server: Ppdserver/Admin.PPD/kristen/Foreign Travel. Traveler's department head must sign **Travel Authorization** Form [1] and **DOE** form [3]. If the travel is on a budget code funded by a different division, then someone with authority on that code must also sign it. 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, the bottom portion of the **Travel Authorization and Expense Voucher** [1] is filled out by the traveler, the form is sent [within two weeks of return] to the Particle Physics Division Foreign Travel Representative who will grant final approval of the costs.

A **Foreign Trip Report**, written according to DOE specifications [Server: Ppdserver/Admin.PPD/Projects/Foreign Travel/New DOE Forms/Trip Report instructions] [see also Trip Report Template] must be written for each foreign trip taken. This report must be written within 20 days of return and sent to the Particle Physics Division Foreign Travel Representative, Barb Kristen, electronically at Kristen@fnal.gov. For 'sensitive' country trips, the Trip Report must be written within 12 days.

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: Barb Kristen, Kristen@fnal.gov, MS 208, ext. 3199; and Luz Jaquez ljaquez@fnal.gov, MS 208, ext. 8261.