College of Education Travel Workflow - Academics and Administration
Fall 2023 - Spring 2024 - Summer 2024

Contact EDU-Travel@usf.edu with any questions, concerns, complaints

Before the Trip	After the Trip
Travel Authorization (TA)	**Expense Report (ER)**
>30 days before the first travel date	*The week after you return*

Before the Trip

Step 1:
1. Identify your funding source(s)
If the trip is 100% grant-funded stop now and contact CREAM
2. Prepare the "COEDU TRAVEL REQUEST FORM"
*If funding for the trip is 'capped' the Travel Request Form must be signed by the Traveler

Step 2:
Email the signed CoEdu TRAVEL REQUEST form to EDU-travel@usf.edu

The CoEdu Travel Coordinator will generate a Travel Authorization in Archivum
*The Travel Authorization will be approved by your supervisor
*The budget will be approved by the Fiscal & Business Analyst

When the TA is approved, Archivum will email the Traveler and Travel Coordinator

Step 3: Purchase Registration & Tickets

Once the Travel Authorization is approved, the Traveler can purchase conference registration and plane tickets.

*All travelers pay expenses up front.

* Never purchase travel expenses for somebody else.

* Proof of efficient purchasing is required. Note P. 2 of the CoEdu Travel Request

*No first class or business class airfare, or lodging <$250/night

Step 4: Enjoy Your Trip

* Get a receipt. Receipts should show what you bought, include a date and the means of payment (cash or credit card)
* You do not have to keep receipts for meals or mileage (both are reimbursed using a formula).

After the Trip

Step 1:
Prepare the "COEDU TRAVEL REIMBURSEMENT WORKSHEET"

Step 2:
Package all receipts, event invitation, schedule or agenda (or agenda-at-a-glance), airfare comparisons and mileage map (If necessary) into one pdf.
IMPORTANT NOTE: Receipts must be complete:
1. Itemize what was purchased and when
2. Show the means of payment
3. Show a $0 balance

Step 3:
Email the COEDU TRAVEL REIMBURSEMENT WORKSHEET and all supporting documents to EDU-travel@usf.edu

The Travel Coordinator will
1. Review the documents and
2. Consult with the traveler if anything is missing or unclear

3. The Travel Coordinator will generate an Expense Report in Archivum.

4. Archivum will send the Expense Report to you via DocuSign

Step 4: Approve your Expense Report

Carefully review the Expense Report and "sign" if it is okay.

Once the traveler has signed, Archivum will submit the ER for approval:
* The Expense Report is approved by the Supervisor and the budget is checked by the Analyst.
* USF Controller's Office conducts spot checks to ensure compliance

When the Expense Report is approved, Archivum will email the Traveler and Travel Coordinator

THE TRAVELER IS TYPICALLY REIMBURSED WITHIN 2 WEEKS

University Controller's Office "Travel & Accounts Payable"
https://www.usf.edu/business-finance/controller/payment-services/travel.aspx