

GRADUATE STUDENT TRAVEL REIMBURSEMENT INSTRUCTIONS (2008-2009)
SOCIOLOGY AND CRIME, LAW & JUSTICE PROGRAM, PENN STATE UNIVERSITY

Within one week of returning from the conference, submit your receipts through the following procedure:

- ✓ Log onto your profile on www.ers.psu.edu.
- ✓ Under expense reports, click “create.”
- ✓ Enter the report name in this format: Last name [comma] First initial [period] [semicolon] Dates of travel [semicolon] destination city [comma] destination state abbreviation.
 - a. For example: Smith, T.; 11/5-8/08; Boston, MA
- ✓ Reimbursement form = “Employee Travel Reimbursement.”
- ✓ Report date = date you are filling out the form.
- ✓ Select Business Purpose = Conference and Professional Meeting.
- ✓ Comments = Type in description of travel and full name of conference (i.e., “To attend American Sociological Association annual conference”) AND the DBAF# (which you will receive via email from Melody Lane). Here, you can also add any comments that will help the financial office understand specific oddities about your reimbursement.
- ✓ Account = 0202164 UP10010 (*make sure you have a space between 4 and UP*).
- ✓ Object code = 0326 for in state travel, 0327 for out of state travel, and 0328 for out of country travel.
- ✓ CCTR-Proj-Subbud = GRAD/TRAV-
- ✓ Click ok to exit the page.
- ✓ Click on “Travel Allowances.”
- ✓ Click on “Create a New Itinerary”. Itinerary name should be the same as your report name. In fact if you start typing in the same report name, it should automatically pop up.
- ✓ Click on “Save and add rows” to add both legs of your travel (to and from).
- ✓ Add the information for your travel to the conference and save.
- ✓ Add the information for your travel from the conference and save.
- ✓ Before proceeding, review the travel information to ensure you entered the correct information.
- ✓ Click on “Fixed allowances.” Here you can deselect any meals for which you should not be reimbursed (i.e., included in your conference fees).
- ✓ Click on “Add Expense.” You will do this step for each type of expense (conference registration, lodging, airfare that is NOT direct billed (Expedia, etc.), parking, etc.

- ✓ You will see your report total on the “Expense List” page. Remember if your airfare was direct-billed you must add your airfare total (including agent fee) to the Report total. If this exceeds your allocation, you will need to “Add Expense” and select “Reimbursement Reduction” to reduce the amount you are being reimbursed.

For example: Your allocation of \$1000 – Airfare of \$350 = \$650. Your total expenses (excluding airfare) are \$750, which means you have exceeded your allocation by \$100. You will then reduce your reimbursement by -\$100.

- ✓ When you are done entering all the necessary information, print your report. This will give you a bar-coded cover sheet (with the fax number). Fax the cover sheet plus all of your supporting documentation to the fax number listed (see Marcy McAfee in 211 for information on how to fax).
- ✓ You will receive an email notifying you when your fax has been received, at which time you should log back into ERS and click “check receipts.” Review the documentation to make sure that all pages went through and all the information is readable (some color inks may not come through as clearly – make sure you check this to avoid delays in your payment).
- ✓ Click “Submit” and log off.
- ✓ Put the packet you faxed in Melody Lane’s box in Oswald 211.
- ✓ You will receive email notifications as your reimbursement is processed by different departments and when it has been deposited into your student account.

If you have any questions throughout this process, please contact the chair of the Graduate Student Travel Committee (Jasmine Fledderjohann, jjf24@psu.edu). If she is unable to answer your questions, she may refer you to Melody Lane (mlane@la.psu.edu).