

Bloomsburg University

TM – Travel Management

Process to Complete a TAR & TER for Faculty Professional Development Travel

For all travel, not just FPDT, please ensure that the TAR includes name of the conference/activity and the nature of their participation (i.e. presenting, chairing and session, etc.) in the “remarks” section since the application truncates some fields and it is sometimes difficult to see this information elsewhere.

Prior to travel, each FPDT award the recipient must submit to the Dean/Director a statement explaining how the individual’s professional responsibilities (class meetings, office hours, chairperson duties, etc.) will be handled in their absence. This can be described in the remarks.

1. Faculty will enter the Travel Approval Request (TAR) in ESS under the Travel Management section.
 - a. All faculty should enter the request for “Insurance Purposes Only.” Faculty will do this by reducing the *Estimated Costs* to \$0.01 and changing the cost center to the “Insurance Purposes Only” cost center. Faculty will then click **Save Draft**. The TAR will not be sent through the work flow and therefore will not be approved. Approval will be done after the FPDT Awards have been awarded by the appropriate College/Area.
 - i. Please be sure to use the appropriate “Insurance Purposes Only” cost center for your Area (Academic Affairs {COST, COLA, COB, COE, AE, Library, Counseling} – 1011450200, Student Affairs {Athletics, Health/Wellness} – 1011450400).
 1. Faculty will change this cost center by selecting *Change Cost Assignment*. They will then manually delete the current costs assignment and enter (type in) the for “Insurance Purposes Only” cost center and select “Accept.”
 - ii. To reduce the sum to \$0.01, Faculty will first enter actual/estimated expenses under Estimated Costs section on the TAR. They will then REDUCE the sum to \$0.01 by entering a negative amount under “Z: Unfunded Travel Cost” (in the Estimated Costs section).
 1. Example: If total costs for the trip come to \$500.00, faculty would then enter \$-499.99 in Z: *Unfunded Travel Costs* and select “Accept.”

| Estimated Costs | | |
|-------------------------------|-----------------|------------|
| Calculate | | |
| Travel Mediums | Estimated Costs | Currency |
| Airfare | 0.00 | USD |
| Baggage Fee | 0.00 | USD |
| Business Meal (auth required) | 0.00 | USD |
| Conference Regist | 360.00 | USD |
| Gasoline | 0.00 | USD |
| Hotel | 89.00 | USD |
| Meals/Subsistence | 51.00 | USD |
| Mileage Reimb | 0.00 | USD |
| Other Miscellaneous Costs | 0.00 | USD |
| Parking | 0.00 | USD |
| Car rental | 0.00 | USD |
| Taxi, shuttle, public trans. | 0.00 | USD |
| Toll | 0.00 | USD |
| Train | 0.00 | USD |
| Z: Unfunded Travel Costs | 0.00 | USD |
| Sum | 500.00 | USD |

| Estimated Costs | | |
|-------------------------------|-----------------|------------|
| Calculate | | |
| Travel Mediums | Estimated Costs | Currency |
| Airfare | 0.00 | USD |
| Baggage Fee | 0.00 | USD |
| Business Meal (auth required) | 0.00 | USD |
| Conference Regist | 360.00 | USD |
| Gasoline | 0.00 | USD |
| Hotel | 89.00 | USD |
| Meals/Subsistence | 51.00 | USD |
| Mileage Reimb | 0.00 | USD |
| Other Miscellaneous Costs | 0.00 | USD |
| Parking | 0.00 | USD |
| Car rental | 0.00 | USD |
| Taxi, shuttle, public trans. | 0.00 | USD |
| Toll | 0.00 | USD |
| Train | 0.00 | USD |
| Z: Unfunded Travel Costs | 499.99- | USD |
| Sum | 0.01 | USD |



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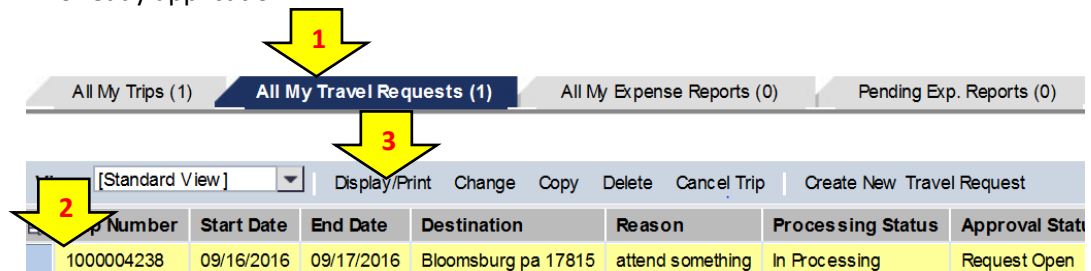
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- b. Once the TAR has been reduced to \$0.01 and the for “Insurance Purposes Only” cost center has been entered, be sure to “save draft”. Faculty will then go to the “All My Travel Requests” main page (1), highlight the TAR they are going to submit for FPDT (the TAR selected will changed to yellow) (2), and then select **Display/Print** (3). This will bring the TAR up as a PDF document and the following selection box will appear on the document:



Faculty can do one of two things, they may select  to save the document to their computer and then upload the PDF Document into their InfoReady application **OR** faculty can select  to print the document, scan it to their computer, and upload it into their InfoReady application.



2. Once FPDT funds are awarded by the faculty members Dean/Director, faculty will go back into ESS and **Change** their TAR to enter the amount of FPDT awarded AND *change the fund center to their college/area FPDT fund center.*
 - a. They will then select **Save and Send for Approval**. This will send the TAR through the electronic approval process.
 - b. Traveler must attach the **FPDT Award Letter to the TAR**.
3. Upon return from the trip, Faculty are to complete a Travel Expense Report (TER) in ESS. A reminder that ALL receipts must be initialed and dated prior to uploading in ESS. ***The FPDT Award Letter must also be uploaded in ESS for reimbursement.*** The Travel Expense Report should be submitted within **ten days** after the travel has been completed.
4. Faculty must also print an additional copy of the TER and submit it along with the completed Faculty Professional Development Summary Report 2016/2017 form (found on the S Drive/BU Documents/Faculty Professional Development Travel) to their Dean/Director **AND** Dean of Graduate Studies within 30 days after return from travel.
 - a. **If faculty fail to submit a completed Faculty Professional Development Summary Report 2016/2017 form, they will NOT be eligible to apply for FPDT in 2017/2018.**