

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

**TRAVEL AUTHORIZATION POLICY**

Prepared by \_\_\_\_\_ Date \_\_\_\_\_  
Luz Jaquez / ID#9613

Approved by \_\_\_\_\_ Date \_\_\_\_\_  
PPD Head

## TRAVEL AUTHORIZATION POLICY

### INTRODUCTION

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

<https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Foreign%20Travel.aspx> .

Particle Physics Division Foreign and Domestic Travel Representative: Luz Jaquez, ext. 8261.

### Domestic Travel:

The Traveler is required to communicate with the department Administrative Assistant about all travel plans. Traveler must give their Administrative Assistant the information needed to fill out the on-line **Travel Authorization** form (**TA**) and the Cost Estimate (forms available at <https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Travel%20Forms.aspx>). The Cost Estimate should accompany the **TA** and the final costs on the two forms should match. The traveler's Supervisor and Funding Officer must also sign the **TA** to authorize the absence from the Lab on business. Complete instructions for travel may be found at this site:

<https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Domestic%20Travel.aspx>.

The form is then routed to the Particle Physics Division Office for signatures.

The **TA** then goes to the Fermilab Travel Office for any reservations that might be needed. It is a Laboratory requirement that all airline tickets must be purchased through the Fermilab Travel Office. The Travel Office will not make any arrangements without this form. Traveler preferences for certain flights or frequent flyer information can be added to the **TA** so that Travel has this information in order to do the booking. The traveler must phone the Travel Office to start the travel process. Omega World Travel will email the traveler and the Administrative Assistant with the travel itinerary and the Traveler should reply to this email with their confirmation. The original **TA** will remain in the Travel Office.

Upon completion of the trip, the traveler is expected to hand over all receipts to the Administrative Assistant who uses the online Expense Voucher to prepare the Travel Reimbursement. The traveler as well as the Funding Officer should approve the voucher. (If the Traveler and the Department Head are one and the same person, the **TA** goes to the Particle Physics Division Office for signature.) The Expense Voucher is then sent to the appropriate Accounting analyst for review and processing.

### Foreign Travel:

Traveler must fill out two forms [1] Online **Travel Authorization** form; [2] **Travel Cost Estimate** form. All Travel Forms are available from any Administrative Support person, OR on-line: <https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Domestic%20Travel.aspx>. Follow instructions for each form. In addition, travel details need to be added into the DOE Foreign Travel Management System (FTMS). Travelers are required to submit their foreign travel requests for DOE

defined non-conference travel at least 30 days before departure date. Request to attend any DOE defined conference must be submitted to the Fermilab Travel Office at least 85 days before the “critical date” of the conference. Conference definition can be found here:

<https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Conference%20Travel.aspx>

Traveler’s supervisor and Funding Officer must sign the **TA** form. If the travel is on a task code funded by a different division, then someone with authority on that code must also sign the **TA** form. 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.

Complete instructions for travel may be found at this site:

<https://fermipoint.fnal.gov/service/TravelSystem/SitePages/Conference%20Travel.aspx>

New foreign travel requests will not be approved by the Particle Physics Division Office until all vouchers from old foreign trips have been submitted.

If the traveler is taking personal time during business travel any costs in excess of business travel will be charged to the traveler.

Upon completion of the trip, the traveler is expected to hand over all receipts to the Administrative Assistant who uses the online Expense Voucher to prepare the Travel Reimbursement. The traveler as well as the Funding Officer should approve the voucher. (If the Traveler and the Department Head are one and the same person, the TA goes to the Particle Physics Division Office for signature.) The Expense Voucher is then sent to the appropriate Accounting analyst for review and processing.

The Particle Physics Division Foreign Travel Representative: Luz Jaquez [ljaquez@fnal.gov](mailto:ljaquez@fnal.gov), MS 208, ext. 8261.