

## Travel Authorization PPD Policy 007-v03

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### Purpose

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Travel is defined as any business travel off-site, other than material pick-up or delivery that lasts less than 90 days. 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.

### Policy

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Until further notice, prior to any foreign-sponsored or hosted virtual events or travel, an approved Travel Request Form is required. These Request Forms need to be completed by the Traveler and submitted to the Traveler's department admin/Travel Preparer. The Travel Preparer will submit Travel Requests to Division Administration by close of business on Fridays. Every Tuesday before noon, the PPD Division Office will email to [travel@fnal.gov](mailto:travel@fnal.gov), with Division Head, Deputy, and Greg Bock on copy.

#### [Download the Travel Request Form](#)

The Travel Authorization and Cost Estimate Form ("TA") is to be filled out before leaving on travel to receive all Fermilab approvals for said travel. It is a two-part online form (TAB 1-TA and TAB 2 - Cost Est. Sheet).

Screen shots and verbiage to help you navigate completing the TA can be found here:

<https://fermipoint.fnal.gov/org/ocro/ppd/ppdweb/PPD%20Administrative%20Assistant%20Noteslinks/Forms/AllItems.aspx?RootFolder=%2F%2Focro%2Fppd%2Fppdweb%2FPPD%20Administrative%20Assistant%20Noteslinks%2FTravel%2Dforms%20%26%20procedures>

Additional information and lab-wide policy on Travel: <https://travel.fnal.gov/fermilab-travel-policy/>

Particle Physics Division Foreign and Domestic Travel Representatives:

Luz Jaquez ([ljaquez@fnal.gov](mailto:ljaquez@fnal.gov)) x8261

Connie Lang ([langcm60@fnal.gov](mailto:langcm60@fnal.gov)) x8020

### Procedure

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#### DOMESTIC TRAVEL

- The Traveler is required to communicate with the department Administrative Assistant about all travel plans. Traveler must give their Travel Preparer the information needed to fill out

the on-line Travel Authorization form (TA) and the Cost Estimate. 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 <https://travel.fnal.gov/foreign-travel>
- 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 needs to provide preferred and/or frequent flyer information to 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 once the form fully approved. 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 Travel Preparer who uses the online Expense Voucher to prepare the Travel Reimbursement. The Traveler, as well as the Funding Officer, should approve the voucher. See the PPD Signature Authority listing for the Travel Approver:  
<https://fermipoint.fnal.gov/org/ocro/ppd/PPDFinance/PPD%20Signature%20Authority/Forms/AllItems.aspx>
  - If the Traveler and the Funding Officer are one and the same person, the TA goes to the Particle Physics Deputy Division Head for signature.
- The Expense Voucher is then sent to the appropriate accounting analyst for review and processing.
- If the Traveler is taking personal time during business travel, any costs in excess of business travel will be charged to the Traveler.

## 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 Travel Preparer as well as here (Service Account required): <https://travelauth.fnal.gov/>
  - Choose the New TA tab.
  - DO NOT SUBMIT. Save only. Follow instructions for each form.
  - Travel details need to be added into the DOE Foreign Travel Management System (FTMS) by the Travel Office.
  - Travelers are required to submit their foreign travel requests for DOE defined non-conference travel **at least 30 days before departure date**.
    - Please keep in mind the amount of time it takes for country clearance and trips cannot be without this approval.
  - Requests 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 travel information and definitions can be found here: <https://travel.fnal.gov/conference-travel/>
- 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.
- Upon completion of the trip, the Traveler is expected to hand over all receipts to the Travel Preparer who uses the online Expense Voucher to prepare the Travel Reimbursement.
  - New foreign travel requests will not be approved by the Particle Physics Division Office until all vouchers from old foreign trips have been submitted.
    - Traveler must submit receipts immediately upon return so reimbursement voucher may be submitted to accounting in a timely manner.
- The traveler as well as the Funding Officer should approve the voucher. See the PPD Signature Authority listing for the Travel Approver: <https://fermipoint.fnal.gov/org/ocro/ppd/PPDFinance/PPD%20Signature%20Authority/Forms/AllItems.aspx>
  - If the Traveler and the Funding Officer are one and the same person, the TA goes to the Particle Physics Deputy Division Head for signature.

- The Expense Voucher is then sent to the appropriate accounting analyst for review and processing.
- If the traveler is taking personal time during business travel any costs in excess of business travel will be charged to the traveler.

## Owner

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Responsibility for reviewing, updating, and communicating changes to this policy rests with the PPD Division Administrator.

## Review Cycle

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This policy is to be reviewed every three years.

## Revision History

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Version	Date	Author	Notes
v01			Original Creation
v02	10/9/2015	Luz Jaquez	Revisions
v03	2/17/2023	Luz Jaquez, Connie Lang	Updated links and minor formatting