Trip Planning Checklist

- Hotels
- Fleet Services or Personal Vehicles
- Certified Drivers
- Travel Request Form
- Travel Roster
- ProTrav Trip Setup
Hotel Reservations & Payments

Booking Directly through the Hotel

Setup and book the reservation using your personal credit card

Setup a time to meet with me (15 minutes) to call in and transfer the payment off of your personal card or complete payment for the 3rd party site. YOU MUST MEET WITH ME TO COMPLETE PAYMENT.

You will be required to provide a credit card at time of check in for incidentals; the university card only covers the room rate and taxes.

Provide Laurel with the required documents after hotel stay: Hotel Verification form, invoices for each room you’ve stayed in (received at checkout)

Booking through a 3rd party (Expedia, etc.)

Identify the reservation you’d like to make, but do not complete booking – they will charge your card at time of booking
Vehicles - Drivers

- If you’re taking fleet services vehicles you have to have AT MINIMUM two (2) certified drivers per vehicle.

- Certifications have two parts:
  - A pass/fail online test (One time test)
  - A Drivers License review with you state of license (has to be done every 200 days)

- License Reviews have a cost that varies from $8-$16 depending on state (Iowa Drivers checks are at no cost)

- Drivers certifications are due at least two weeks ahead of anticipated trip
Forms

- Travel Request Forms are due at least one week in advance.
- Travel rosters must be completed at least 24 hours prior to travel.
  - If you know who is traveling at the outset, include it in the initial request.
ProTrav Trips

• You need to set up a trip in ProTrav if:
  • The club paid an entry fee for the trip
  • You are taking Fleet Services Vehicles
  • You plan to reimburse drivers for fuel or mileage
  • You stay in a hotel
  • You spend any kind of money from your club account related to the trip
Travel Expense Voucher (TEV)

- You need to create a TEV for reimbursements related to trips
  - Most typically for gas or mileage expenses
PROTRAV
REIMBURSEMENTS & FLEET SERVICES

Sport Clubs
Sport Club Resources

- Navigate to the University of Iowa recreational services website
- Choose Programs > Sport Programs > Sport Clubs
- For additional Sport Club resources, choose “Officer Information/Forms”
- You will find resources such as…
  - Hotel Verification Form
  - Roster Form
  - Step by step guides for Creating a Trip, Hotel & Mileage Reimbursement, Facility Use, and other useful guides
Creating a trip with ProTrav

• Go to the University of Iowa website and click on “Faculty/Staff” in the upper right corner of the homepage

• Next, click on “Employee Self Service”
Creating a trip
Log in using your HawkID

• Click on the “Administration” tab

• Select “ProTrav (Pcard Vouchers & Travel)”
For your protection, 2-Step Verification is now available for Employee Self Service. See http://its.uiowa.edu/duo for more information and to enroll.

Data Access
- AP-PO PeopleSoft
- CAM (Capital Assets Management)

Systems
- Cash Handling Audit Procedures
- Driver's License Review System
- E-Pro (E-Vouchers & PReqs)
- Jobs@UIOWA
- ProTrav (Pcard Vouchers & Travel)
- Service Center Survey

Forms
- Data Warehouse Access Form
- Facilities Management Requisition
- Fleet Services Requisition
- Workers Compensation

LEARN ABOUT CUSTOMIZING SELF SERVICE
ProTrav

• Select “Create New Trip”
• Choose yourself as the principal traveler, or the person that will be seeking a reimbursement
Create a Trip

1. Trip Basics
2. Funding
3. Submit

ProTrav's trip creation process allows University Students, Faculty and Staff the ability to provide detail on their trip, travel and itineraries, including contact information when traveling for the purpose of facilitating communication in the event of an emergency. Find more help about the trip creation process.

* required

Principal Traveler

- Select -

Brittany Lynam
Someone Else

Name / Department / Address

* Please select the individual traveling on University of Iowa business.

Trip Essentials

Purpose of travel

- Select -

Type of travel

Individual

Trip Description

Trip comments
Trip Essentials

• “Purpose of Travel” will always be “Team/Group Travel”
• “Type of Travel” will always be “Group/Team”

• Type in the name of the event for “Trip Description”
ProTrav's trip creation process allows University Students, Faculty and Staff the ability to provide detail on their trip, travel and itineraries, including contact information when traveling for the purpose of facilitating communication in the event of an emergency. Find more help about the trip creation process.

* required fields

**Principal Traveler**

- BRITTANY LYNAM
- SOMEONE ELSE

Name / Department / Address

* Please select the individual traveling on University of Iowa business.

**Trip Essentials**

- Purpose of travel *
  - Team/Group Travel
- Type of travel *
  - Group/Team
- Trip Description *
  - Sport Club Tournament
- Trip comments
  - Chicago, Illinois

**Trip Destinations**
Trip Destinations

- Complete and be sure to save destination

![Trip Destinations](image)

* Please enter at least one destination

**Departure date:** 08/24/2015  
**Return date:** 08/25/2015

**Country:** United States

**State:** Illinois

**City/Province:** Chicago

[Save destination]
Personal Travel

• Sport Club Trips do not have personal travel, choose NO
Destination Addresses

• Enter address for the club’s lodging such as hotel or field location if applicable
• After entering your information, be sure to press “Save”
Travel Contact and Additional Considerations

• Add Travel Contact and save

• For additional considerations, choose YES if you are using your club account to pay for any part of the trip
Funding MFK

- Enter the Funding MFK:
  - 450 49 4685 404XX 6035 000000000000000000000000
- The numbers in bold for the “SDEPT” section will be specific for each individual club
- After entering the funding MFK information, be sure to choose “Save MFK” and click continue.
• After confirming that the trip information is correct, “Submit Trip”

• After you submit the trip, you must route the trip with Workflow by choosing “Continue with Workflow”
Final steps

• Choose “Rec-Services routing” and click “Continue”

• If the Sport Clubs Coordinator is not listed, choose “Not Listed” and click “Continue”

• Enter the name or ID number of the Sport Clubs Coordinator and choose “Continue”
• After the transaction has been routed for approval, you are finished 😊
Reimbursements

• On the University of Iowa website click “Faculty/Staff”
• Next, choose “Employee Self Service” and log in with your HawkID
• Select “Administration”
• Click on ProTrav (Pcard Vouchers & Travel”
• Now choose “Create TEV” for your reimbursement
• Search for trips under the name of the person seeking reimbursement
• After finding the trip, choose “Create TEV”
• For “Expense Type”, choose “Hotel” or “Transportation” depending on what the traveler is seeking reimbursement for
Hotel Reimbursement

• If you choose “Hotel” you will see a subgroup menu of options. Typically you will select “Hotel room”
• For “Date of expense” enter the date on which your personal card was charged by the hotel
• In the ‘Comments” box you must give an explanation of your expenses.
• Enter ONE base room rate and daily tax rate
• **Combine the charges of all rooms your club will be staying in for one night**
• Enter your room’s combined charges for base rate, daily tax, and the number of nights stayed in the hotel
• The total expense will be calculated automatically
**Form Type:** TEVFS  
**Traveler:** Laurel Hanna (LHNNA)  
**Trip description:** Practice  
**Trip purpose:** Team/Group Travel  
**Trip comments:** Practicing using protrav  
**Trip dates:** Tuesday 08/18/2015 - Wednesday 08/19/2015

**Destinations:**  
- HONOLULU, HI, USA (08/18/2015-08/19/2015)

### Expense Editor:

**Expense type:** Hotel  
**Policy for this expense type:** Hotel room  

**Hotel room expense**  
**Date of expense:** 08/19/2015  
**Destination:** HONOLULU, HI, USA (08/18/2015-08/19/2015)  
**Comments:** One room at $100.00 per night for the practice

Please enter the daily hotel/room expenses as requested below:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base room rate</td>
<td>$100.00</td>
</tr>
<tr>
<td>Daily room taxes</td>
<td>$15.00</td>
</tr>
<tr>
<td># of business days</td>
<td>1</td>
</tr>
</tbody>
</table>

**Total hotel expense:** $115.00

**Was hotel the official conference site/headquarters hotel?**  
- [  ] No  
- [x] Yes

### Expenses for this TEV:

**Hotel**  
<table>
<thead>
<tr>
<th>Edit</th>
<th>Del</th>
<th>Isplit</th>
<th>Date</th>
<th>Item</th>
<th>Expenses</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>08/19/15</td>
<td>Hotel room</td>
<td>$115.00</td>
<td>One room at $100.00 per night for the practice</td>
<td>$115.00</td>
</tr>
</tbody>
</table>

**Total:** $115.00

**Total Out-of-pocket expenses:** $115.00

**Total itemized expenses:** $115.00

[Save and Proceed to Accounting Page]
• Choose if the hotel was an official conference site or headquarters.
• After you review the information you entered, choose “Save and Proceed to Accounting Page”
• Select payment method and review the MFK number.
• “Save and Proceed to TEV Summary/Review”
Attach necessary files for your trip

- “Attach file/s”
- **1.** Itemized receipt from the hotel
- **2.** ProTrav reimbursement form
- **3.** Hotel Verification
  - Each trip should have a proof of competition attached
  - Be sure to select “add attachment”
  - When complete, ‘Submit to workflow”
Mileage Reimbursement

• Same steps leading up for hotel, except you will choose “Transportation” for expense type and then “Mileage”
• Select the date you returned from your trip
• Click the “Mileage calculator” to use the University’s approved mileage calculator
Mileage Calculator

The Rand McNally mileage calculator will help you determine the mileage between any two destinations.

Enter Starting Point

A  Iowa City, IA.

Enter Ending Point

B  Chicago, IL

Mileage:

222.8 miles

Time:

3 hrs 27 min

Get Mileage

Get Directions for This Route
Mileage

- Calculate any additional mileage and your total miles traveled in the comments box.
- Rate of payment will be adjusted to University standards
- Choose “Save expense”
• Review reimbursement information
• “Save and Proceed to Accounting Page”
• Select payment
• Review MFK
• “Save and Proceed to TEV Summary/Review”
• Once you have finished entering items for reimbursement, you can “Submit to Workflow”
Fleet Services

• Required before you make a fleet services request:
  - All drivers have been trained and certified
  - A trip has been created through ProTrav
• On the Uiowa website, click on “Faculty/Staff”
• Select “Employee Self Service”
• Log in with your Hawk ID
• Select “Select Administration”
• Choose “Fleet Services Requisition”
• “Start a new requisition”
• REMEMBER: vehicles cannot be picked up outside of Fleet Services operation hours!
• Enter destination information
• For “Purpose” make sure to identify which club you are involved with
Fleet Services Requisition

Start a New Requisition

GENERAL TRIP INFORMATION

Vehicle will be picked up: 09/09/2015 at 7:00 AM
Vehicle will be returned: 09/10/2015 at 10:00 PM
Vehicle pickup location: Fleet Services, 155 W. Harrison
I will be leaving my personal vehicle at the pickup location: No

Destination: Chicago
Purpose: Sport Club

I would like a GPS Navigation Assistance Device: No
I would like an IPASS transponder: No
Type of vehicle requested: Please choose a vehicle type

DRIVER/PASSENGER

• Choose what type of vehicle you would like to take on your trip
• Larger vehicles will ask if you plan to haul a trailer of your own with your vehicle
• Be sure to read through the information provided about hauling trailers and enter the information about your trailer
When towing a trailer vehicle handling and dynamics are significantly different. It is important that departments only allow those drivers who have sufficient skills and experience to tow trailers.

Additionally, there are various weight limits for the different vehicle types depending on the trailer weight. This form will assist Fleet Services in ensuring that the vehicle specifications allow towing your trailer and that your drivers have the skills and experience to drive the vehicle and tow the trailer safely.

By approving this form, I certify that the drivers listed on this requisition have the experience necessary to safely drive the requisitioned vehicle and tow the trailer described below. I further certify that the drivers listed on the requisition can perform all of the tasks listed below:

- hook and unhook the trailer mechanical connections including safety chains
- hook and unhook the electrical connections
- adjust and use the electric brake controller (if applicable)
- ensure the trailer is loaded correctly to ensure the proper tongue and axle weights.
- understand the weight limits of the vehicle/loaded trailer combination
- knows the laws and regulations related to trailer towing
- knows how to use and adjust sway bars or other trailer stabilization devices (if applicable)

I verify that the trailer is properly licensed, is owned by the University, and is in good mechanical condition.
Driver Info

- Each club will be required to have at least two drivers for their trip. BE SURE TO ADD A SECOND DRIVER
- Select your driver type from the drop down menu
  - selecting “Other” will require you to include additional info, so it is best to use student drivers
- Click “Driver Search” to find your drivers
DRIVER/PASSENGER

Driver Information

Add a Driver

Driver #1 Info

Driver Type: Select One: [Dropdown]
If other, please describe: [Field]

ID/Name: [Text Field]
Driver Search
How old is the driver?: [Select One:]

D/L#: [Text Field]
D/L State: Iowa

Passenger Info

Number of Passengers: [Number Field]

Passengers are:
- [Radio Button] Staff
- [Radio Button] Students
- [Radio Button] Patients
- [Radio Button] Other
If other, please describe: [Field]

WHOM MAY WE CONTACT REGARDING THIS REQUEST?

Contact Person: [Text Field] Lynam, Brittany C
Employee Search

Secondary Contact: [Employee Search]

Reminder Email:
- [Checkbox] I would like a reminder email sent to all contacts & drivers at noon the day prior to the reservation.
For “Driver “Search”, you will enter the Last and First names of your driver

- Student ID number can also be used
- When your driver has been found, select him/her as the user
- Fill out driver information
  - Driver’s License Info, age
  
*out of state drivers will require a driving record check for a nominal fee set by their home state, so in state drivers are recommended

- Repeat for other driver
• Enter the number of non-driving passengers into “Passenger Info” and choose which type of passenger they are (staff, students, patients, other)
• If a coach is riding along, select “Other” and enter “Coach” in the box
• Change the primary contact for your request to the **Sport Club’s Coordinator** by selecting “Employee Search”

• After you find the name of the Coordinator, add **yourself** as the secondary contact
- Enter the MFK number
450 49 4685 XXXX 6035 000000000000000000000000

*Remember to include your club’s individual number in the box for “SDEPT”

- “Route form through Workflow”
- If Rec Services is your default routing option, choose the department and click “Continue”
- If they are not your default department, select Rec Services
- “Continue”
• If you have additional vehicles to request, repeat the process at the Fleet Services Requisition home page
Important Points to Remember

- Drivers must be certified before they can register as a driver
- All out of state drivers must have their record checked
- Vehicles cannot be picked up outside of Fleet Services hours of operation
- Act responsibly while operating Fleet Services vehicles
Travel Officer Access

• Complete and leave the HR form with me
• You will need to meet with our HR representative or HR intern to complete your complimentary appointment
Wrap Up

For questions, contact:

Brittany Lynam
Sport Clubs Intern
Brittany-Lynam@uiowa.edu

Or

Laurel Hanna
Assistant Director, Sport Clubs & Hawkeye Rec Fields
Laurel-Hanna@uiowa.edu
319-384-1632