

***ORAU Travel Training Scripts*****Create an ORAU Travel Approval Request (TAR) – Research Participant**

<i>General Travel Information</i>		
#	Navigation/Path	Description/Comment
1	<b><i>Input Your Name</i></b>	First, middle initial, last
2	<b><i>Input Your Address</i></b>	List the address you want your travel information mailed to.
3	<b>Input Your Work Telephone, Fax and E-mail</b>	
4	Input the <b><i>Start Date</i></b> (i.e., date travel is to begin).	Any date format is acceptable. (MM/DD/YY, M-D-YY, January 1, 2003, etc)
5	Input the <b><i>End Date</i></b> (i.e., date travel is to end).	Any date format is acceptable.
6	Input the <b><i>Reason</i></b> for travel.	Provide a justification for the travel.
7	Input Flight Departure/Return Dates, Times, Cities	If you want ORISE to purchase your airline ticket, then list your specific flight information (departure/return airline, flight #s; times, etc), list them here.
8	Input any <b><i>Comments</i></b> you feel are necessary.	
9	Indicate if this is <b><i>Domestic</i></b> or <b><i>Foreign</i></b> Travel by clicking on the appropriate radio button.	<p><u>Domestic</u> – All travel within the continental US (does not include Hawaii and Alaska)</p> <p><u>Foreign</u> – All travel to a foreign country, including Canada and Mexico.</p> <p>You can obtain more information about <u>Foreign Travel</u> by visiting:  <a href="http://intraweb.orau.gov/services/travel/manual/travelmanul.htm">http://intraweb.orau.gov/services/travel/manual/travelmanul.htm</a></p>
10	Indicate if <b><i>Personal</i></b> travel is involved by clicking on the appropriate radio button.	<p><u>Yes</u> – if at any time during the trip, you plan to be on personal time (weekends or annual leave).</p> <p><u>No</u> – if you will be on business the entire duration of the trip.</p> <p>Note: Personal time is any time spent in travel status when you are not on official business. (Usually time that will recorded as an approved absence or non-business days such as a weekend.)</p>
11	If the <b><i>Airfare</i></b> is to be purchased by ORAU, click the	<p><u>Yes</u> – The ORAU Travel Office will purchase the ticket and the ORAU ghost account will be billed.</p> <p><u>No</u> – You will incur the cost of the airline ticket which will be</p>

	appropriate radio button.	reimbursed after submitting a Travel Expense Statement
12	If a <b>Registration Fee</b> is to be purchased by ORAU, indicate by clicking on the appropriate radio button.	<u>Yes</u> – ORAU will register and/or pay the registration fee on your behalf. <u>No</u> – You will incur the cost of the registration fee ticket which will be reimbursed after submitting a Travel Expense Statement
13	Indicate if a <b>Travel Advance</b> is requested from ORAU.	<b>Travel Advance Requests will be considered on a case-by-case basis</b> <u>Yes</u> – ORAU will issue a check or EFT payment to you prior to the start date (normally for the amount of your estimated per diem). <u>No</u> – A cash advance is not needed. (No is the default).
14	Click the Save Button.	After clicking the save button you may also review the TAR at any time during data entry by clicking on <b>Review</b> at the bottom of the form. This will produce a summary view of the TAR. To continue working on the TAR, click on the <b>Destination</b> button at the top of the page.
<b>Destination Information (Unlimited destinations may be entered)</b>		
15	Click on the <a href="#">Destination</a> tab.	The <i>Destination</i> data entry form appears.
16	Input the <b>City</b> that you will be departing from (i.e., Knoxville, Atlanta, Nashville, etc.).	
17	Input the <b>City of Lodging</b> .	
18	Select the <b>State of Lodging</b> from the drop down menu.	To narrow the selection, type the first letter of the state. Continue selecting the letter or use the scroll bar to find the appropriate state.
19	Hotel	If you want ORISE to <b>reserve</b> your hotel, click YES, otherwise, click no
20	Select the <b>State</b> from the drop down menu that you will be departing from (i.e., Tennessee, Nevada, etc.).	To narrow the selection, type the first letter of the state. Continue selecting the letter or use the scroll bar to find the appropriate state.

	Input the Hotel Name/Telephone #	If you want ORISE to <b>reserve</b> your hotel, list the name and telephone. If a credit card # is required to reserve your hotel and you don't have an ORAU Diners Club card, <b>you will be contacted by ORAU Travel Office and required to provide a valid credit card number.</b>
21	Select the <b>Travel Mode</b> from the drop down menu.	
22	Enter the <b>Start Date</b> .	The start date is defaulted, but can be changed when entering multiple destinations.  Note: The start date is the first day of travel unless you are entering multiple locations. If you are entering multiple locations, the start date of the first location is the first day of travel. For subsequent locations, the start date is the first day of travel to the new location.
23	Enter the <b>End Date</b> .	The end date is defaulted, but can be changed when entering multiple destinations  <b>Note: For multiple locations, the end date is the last night of lodging unless you are entering the last destination. For the last destination, the end date is the last day of travel.</b>  <b>Note: The start dates and end dates for all locations must fall within the start and end date range entered for the trip on the General tab.</b>  <b>Note: If you return after midnight (1) change the end date on the General tab and (2) add a destination with a zero room rate.</b>
24	Indicate if you will need a <b>Rental Car</b> .	Indicate the <b>size</b> of the rental car needed (compact, mid-size, full-size, etc.)
25	If you will be using a rental car, please indicate a <b>Rental Justification</b> .	Explain in detail why a rental vehicle is needed. If the size needed is different than what is allowed in the travel policy, please indicate the justification.  <b>Note: Repeat steps 16 – 26 to enter additional destinations.</b>
26	Click the Save Button.	You may review the TAR at any time during data entry by clicking on <b>Review</b> at the bottom of the form. This will produce a summary view of the TAR. To continue working on the TAR, click on the next tab at the top of the page.  <b>Note: After clicking save, if any items appear in red, this indicates a problem that needs to be addressed before you</b>

		<b>can continue completing the TAR.</b>
<b>Per Diem Information</b>		
27	Click on the <a href="#">Per Diem</a> tab.	The <i>Per Diem</i> data entry form appears.
28	Select the <b>Per Diem</b> from the drop down menu.	<p><u>Domestic Per Diem</u> - The Travel Management Policy sets the domestic Per Diem rates for Federal agency travelers while on official business for the Government. These rates are part of Appendix A to Chapter 301 of the Federal Travel Regulation and updated on a fiscal year cycle, effective October 1 of each year.</p> <p><b>Note: Per diem rates are based on the city of lodging, not the city of business.</b></p>
29	Input the <b>Room Rate</b> .	<p>Rate is the per night rate exclusive of taxes.</p> <p><b>Note: If you will not incur any cost for the room (examples: staying with friends, ORAU will be direct billed for the lodging, etc.), enter zero for the room rate.</b></p>
30	Input the <b>Room Tax</b> .	Estimated amount of taxes per night.
31	If the Room Rate exceeds the allowable Per Diem, please enter a <b>Lodging Waiver</b> justification.	<p>A lodging waiver justification is required if the lodging ceiling is exceeded.</p> <p><b>Repeat steps 28 – 32 to enter additional per diem requests.</b></p>
32	Click the Save Button.	<p>You may review the TAR at any time during data entry by clicking on <b>Review</b> at the bottom of the form. This will produce a summary view of the TAR. To continue working on the TAR, click on the next tab at the top of the page.</p> <p><b>Note: After clicking save, if any items appear in red, this indicates a problem that needs to be addressed before you can complete the TAR.</b></p>
<b>Prepay Information</b>		
33	Click on the <a href="#">Pre-Pay</a> tab and select the <b>Pre-Payment Type</b> from the drop down menu.	<p>If no prepayments are requested, move to the next tab.</p> <p>Prepayment choices include: Hotel Prepayment, Registration Fee, Cash Advance, and Other. If justification is needed, please add in comment section.</p> <p>If hotel prepayment is selected, all costs will be charged to your ORAU Diners Club Card. If you do not have an ORAU</p>

		Diners Club Card, you will be contacted by the ORISE Travel Office and required to provide personal credit card information.
34	Input the <b><i>Date Required</i></b> (i.e., the date you need the advance payment).	Input the date that the payment should arrive at the payee's location. Any date format is acceptable. (MM/DD/YY, M-D-YY, January 1, 2003, etc)
35	Input the <b><i>Amount</i></b> needed.	
36	Input to whom the check should be made out to in the <b><i>Payable To</i></b> field.	
37	Input <b><i>Address Line 1</i></b>	Include a complete address with city, state and zip
38	If needed, enter <b><i>Address Line 2</i></b> , <b><i>Address Line 3</i></b>	Include a complete address with city, state and zip
39	Input any <b><i>Comments</i></b> you deem appropriate.	<b>Repeat steps 33 – 40 to enter additional prepayment requests.</b>
40	Click the Save Button.	You may review the TAR at any time during data entry by clicking on <b><i>Review</i></b> at the bottom of the form. This will produce a summary view of the TAR. To continue working on the TAR, click on the next tab at the top of the page.  <b>Note: After clicking save, if any items appear in red, this indicates a problem that needs to be addressed before you can complete the TAR.</b>

### ***Estimate Information***

41	Click on the <a href="#">Estimates</a> tab.	The <i>Estimates</i> data entry form appears. <b>NOTE: The Destination, Start Date, End Date, Room Rate, Room Tax, and Lodging, and MIE default from data previously entered.</b>
42	Input the <b><i>Estimated Total Air Expense</i></b> , if any.	
43	Input the <b><i>Estimated Total Rental Car Expense</i></b> , if any.	
44	Input the <b><i>Estimated Personal Vehicle Round Trip Mileage to/from Destinations</i></b> .	The system will use the effective mileage rate to calculate the mileage expenses. System will perform the calculation after you click on the Save button.  <b>Note: Round trip miles include the total miles to and</b>

		<b>from destinations, exclusive of intra-city miles.</b>
45	Input the <i>Estimated Personal Vehicle Intra-city Mileage.</i>	The system will use the effective mileage rate to calculate the mileage expenses.  <b>Note: Intra-city miles are miles driven during your stay at a destination.</b>
46	Input the <i>Estimated Personal Vehicle Round Trip Mileage to/from Airport.</i>	The system will use the effective mileage rate to calculate the mileage expenses. System will perform the calculation after you click on the Save button.
47	Input the <i>Estimated Airport Parking Expense.</i>	
48	Input the <i>Estimated Hotel Parking Expense.</i>	
49	Input the <i>Estimated Telephone Personal Expense.</i>	
50	Input the <i>Estimated Telephone Business Expense.</i>	
51	Input <i>Estimated ATM Fees</i>	
52	Input the <i>Estimated Ground Transportation Expense.</i>	Cost of taxi, subway, bus, shuttle service, etc.
53	Input the <i>Estimated Gasoline Expense.</i>	Use to estimate gasoline expense for rental cars.
54	Input the <i>Other Estimated Expenses.</i>	Any miscellaneous expenses not previously listed.
55	Click the Save Button.	You may review the TAR at any time during data entry by clicking on <b>Review</b> at the bottom of the form. This will produce a summary view of the TAR. To continue working on the TAR, click on the next tab at the top of the page.  <b>Note: After clicking save, if any items appear in red, this indicates a problem that needs to be addressed before you can complete the TAR.</b>

### SUBMITTING A TAR FOR APPROVAL

#	Navigation Path	Description/Comment
1	Under any tab, click on	The system performs validations and displays messages

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	the <b>Verify TAR</b> button.	in red if there is missing information. Use your browser's back button then navigate to the correct tab to make corrections or add missing information.
2	Once you have added information in all required tabs, and no more red information is visible after clicking the <i>review</i> button, the TAR is complete and has automatically been sent to ORISE.	<b>After submitting the TAR, you are required to print the verify page of the TAR, obtain the required approval signatures, and fax it to your ORAU/ORISE travel contact. If possible, please contact ORISE and notify them that you have faxed the TAR.</b>