ESD Domestic Travel Procedures at a glance

July 2008, REV03

For complete information go to **Berkeley Lab Travel** (http://travel.lbl.gov/) or
ESD Business Practices: Travel (http://www-esd.lbl.gov/workplace_resources/business_practices/travel.html)

Pre-Trip Approval

- **Travel Authorization must be approved prior to making your reservations!**
  - Discuss plans with your Supervisor/PI/Program Head and **obtain a Project ID**
  - (If the trip is Paid By Others, contact an ESD Travel Coordinator for guidance).
- Prepare a **Travel Authorization** on-line using the **TR**avel **EX**pense (TREX) System (type in "**trex.lbl.gov**" in any URL browser from anywhere in the world),
  - Use **Authorization – Create** to obtain an **LBNL Trip#** for domestic and foreign trips.
- **If you are traveling to a conference** (refer to the Conference Questionnaire http://www.lbl.gov/Workplace/CFO/assets/docs/conf/ConfForms/conf_Event_Questionnaire.doc to determine if you are attending a conference) contact an ESD Travel Coordinator to process approvals.

DIVISION REVIEW

- ***Please ensure that the PROJECT ID has sufficient funds to pay for your trip!***
  - *Your Travel processing may be delayed if the Project ID does not have sufficient funds.*
  - *Your Authorization will be reported to the Program Head for further review.*

Make Your Reservations/Purchase

- Ensure that you are booking Y-Cal fare rates, or you may be personally responsible for costs that exceed the allowable cost(s) for your trip. You can review rates and discount opportunities from http://travel.lbl.gov/air_car_hotel/air.html or call the Lab Travel Agency Carlson Wagonlit Travel.
- Provide the LBNL Trip# in order to direct-bill air tickets to LBNL:
- Book on-line using **Travel Power (Cliqbook)** (https://app2.outtask.com/default.asp?host=www.cwt.com)
  - (Recommended for easy to book, regular trips. This will save some money in operation costs.)
- Contact **Carlson Wagonlit Travel (CWT)** by phone at 1-888-243-1125
  - (Recommended for more complex multi-leg segments or foreign travel).

If Traveler elects NOT to use CWT and purchase ticket on personal credit card or LBNL Corporate Travel Credit Card:

- Book with your preferred web site ensuring the fare is lower than an available Y-Cal fare. (We recommend that you contact CWT or Maxine Redfearn (x6177) for Y-Cal fare quote to compare with.)

Reimbursement/Expense Report (electronic entry and signatures)

- Complete the **Domestic/Local Travel Expense Report** on-line at (**trex.lbl.gov**)
- **Select the appropriate Program Head to approve** the trip expenses
- **Certify** the Expense Report
- Print out the **Printable View** screen and tape/attach original receipts as needed (air, car, hotel, registration and misc. items >$75)
- Forward all documentation to an ESD Travel Coordinator for further processing.
- ESD TC will review voucher and arrange for the appropriate Program Head to manually approve the expense voucher and thereafter forward all original documentation to the Travel Office for further processing and payment.
- **DO NOT FORWARD ANY TRAVEL DOCUMENTATION TO THE LBNL TRAVEL OFFICE AS IT MAY GET LOST**

Contact the ESD Travel Coordinators, x6455 Bldg 90/64; x6740 Bldgs 70/70A/14.

For a complete description of these and all other policies, please refer to the LBNL RPM at http://www.lbl.gov/Workplace/RPM/, or contact Maryann Villavert, ESD Business Manager 510/486-7357, mvillavert@lbl.gov