Travel Reimbursement Form

This documentation is for the Travel Reimbursement Form – located at

https://newforms.vsc.edu/ and please click on the Travel Reimbursement Form

You can also find this under the VSC Portal / Quick Links / VSC Forms.

There are 9 main pages to this form:

AP – Requester Info *(For information about you and your supervisors for approval)*

Travel Details *(Repeatable page - For logging 1 – 20 trips/days of travel – Requires: Date, Destination, Travel Miles, Commuting Miles – Optional: Incidentals/Other Expenses)*

Additional Info *(Bargaining Unit, Address, Grants Expense, Faculty Professional Development Expense, Month and Year of Travel, Business Purpose of Travel, Amount of Advance, any Missing Receipts)*

Missing Receipts *(Conditional – explanation of any additional expenses)*

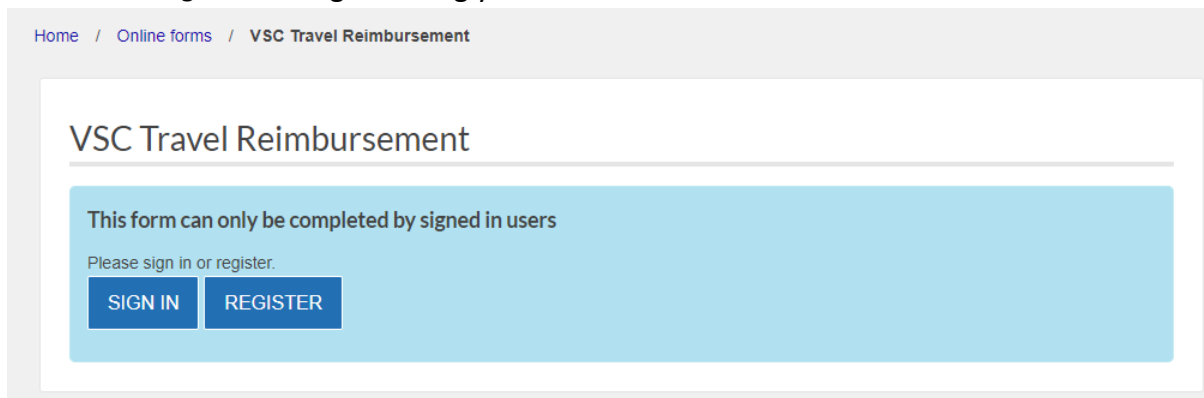**Travel Review Chart** *(Review your submitted travel and check for mistakes, calculates reimbursement)*

GL Codes and Supporting Documents *(Assign GL Code(s) to your Reimbursement total, Upload Documents)*

GL Codes Charges Review *(Review Amount billed to GLs compared to Reimbursement Total)*

GL Codes Charges Error *(Conditional – if Amount billed to GLs differs from Reimbursement Total)*

The form does have built-in error checking to verify if you are filling it out properly such as required fields are complete. Each page will show an error if you do not fill out required information or if you enter something incorrectly. The GL Codes Charges Review Page will also total the amount billed to each GL code and error if it does not match the invoice total.

Please click "Sign In" and sign in using your VSC Portal credentials.
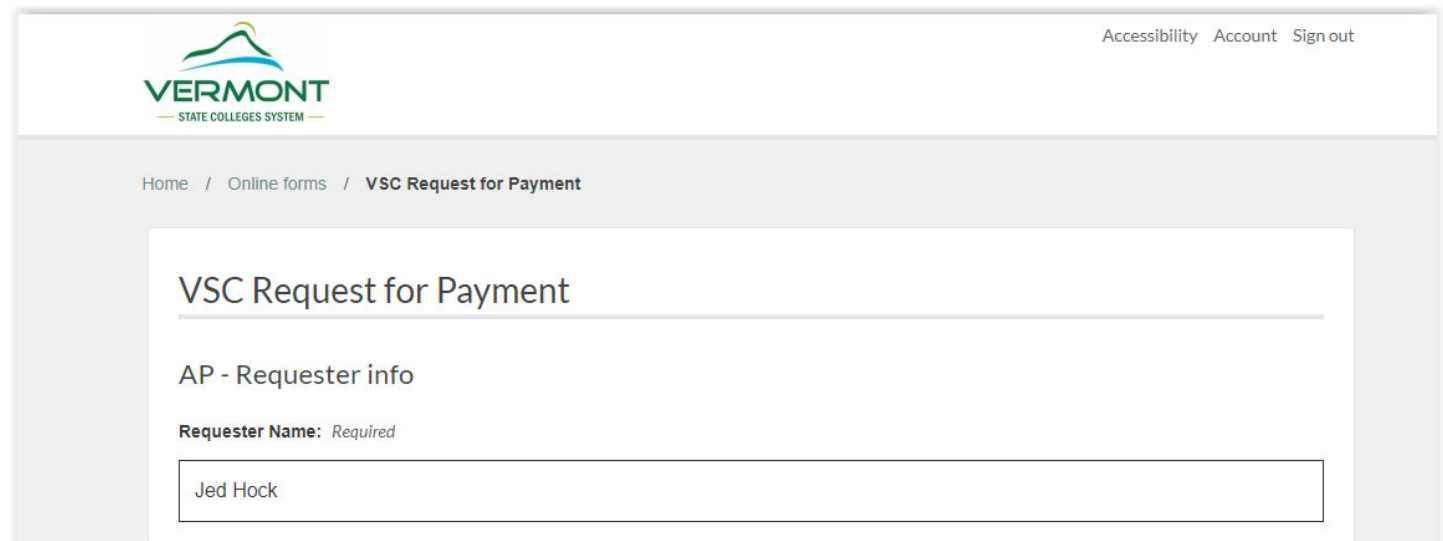
AP – Request Info

The system should auto populate your full name, Colleague ID#, User ID, Email Address. You are required to enter a phone number that is best to reach you at. Please enter what Department you work for. From the VSC Organization drop down please choose which is your organization. If your organization has more than one campus, please make sure to choose which one from the new question presented. Please enter your supervisor's info, then choose the Divisional Dean from the drop-down list. The divisional dean, Dean of Admin, and President will change based upon what organization you have chosen.

The VSC requires all faculty and staff to submit their own travel form. However, in approved circumstances, if submitting on behalf of another person, you will need to change the pre-filled requestor information from your information to the traveler's information. Change the Requestor Name, Colleague ID #, and User ID with the traveler's name, their colleague #, and their VSC User ID. The email address entered will be the person who will receive the confirmation email of submitting the form. The phone number is used if AP needs to call if we have questions.

Once you have filled out that page you can click "Next".

Travel Details: Year/Month and Days of Travel

Enter the month and year of your travel, and then enter the total number of days traveled during this period.

At any time during the form, you can return to this page using the "Previous" button to add additional days of travel.

Please click "Next" to Proceed with logging Travel.

Day of Travel (This page will repeat for each day of travel)

Choose the date in the date field, by using the calendar button located on the right-hand side of the field. Please enter a destination, travel miles, commuting miles (Required – can be zero "0"), and any incidental/other expenses (under $10). This process will repeat until you reach the total number of days traveled as specified on the previous page. As a reminder, you can always navigate back to page 2 to add/remove days of travel using "Previous" or "Next".

Additional Info

Please Select your Appropriate Unit *Required*

No Bargaining Unit	⌄

Please select your Bargaining Unit if you are a part of one.

Address - Checks will be mailed to the address on file unless there's an exception.

Choose your bargaining unit if you are a member of one.

If you have recently moved or are unsure of your address on record, enter your mailing address in the Address field.

Please Note: AP uses a different record system than UKG, so updating your address with UKG will not update your address for Travel Reimbursements. The same is true for direct deposit information. If you would like to set up Direct Deposit for travel reimbursements, please sign up via VSC Employee portal, under Employee Services and click on AP eCheck/eRefund Enrollment.

If this is a Grant Expenditure, please click "Yes" and fill out the required information.

Grants

Is this a Grant Expenditure? *Required*

○ Yes
● No

If this is a Faculty Professional Development Expense, please click "Yes" and fill out the required information.

Faculty Professional Development

Is this a Faculty Professional Development Expense? *Required*

○ Yes
● No

In the Business Purpose of Travel section, provide a description of your travel and the purpose it served.

Business Purpose of Travel *Required*

If you received an Advance for your Travel – Please input the amount.

Amount of Advance, if Requested?

If you have any missing receipts related to Incidentals/Other Expenses, please click "Yes." Otherwise leave set as "No."

Do you have any missing receipts related to Incidentals/Other Expenses? *Required*

No ⌄

Missing Receipts

If you answered yes on the previous page to having missing receipts related to Incidentals/Other Expenses then you will have to fill out this page.

Missing Receipt 1

Date of Purchase 1 *Required*

mm/dd/yyyy 📅

Amount of Purchase 1 *Required*

Vendor 1 *Required*

Purpose/Description 1 *Required*

Do you have any more missing receipts? *Required*

No ⌄

For each missing receipt please provide the date of purchase, amount of purchase, vendor, purpose/description. At the bottom there's a follow up question asking if you have any more missing receipts. You can log up to 5 missing receipts for Incidentals/Other Expenses.

On your last missing receipt, please enter in "No" in the last question to advance to the next section.

Travel Review

This page presents a chart of your travel. This is the best place to make sure you did not make any mistakes. Please review the travel chart for each day logged and verify if it's correct.

Here's an example of what it looks like –

Travel Review

Please review this table of information that you have entered for your Travel Reimbursement. You can return to a previous page to fix any issues before moving forward. You traveled **2 day(s)** this month.

DATE	DESTINATION	TRAVEL MILES	COMMUTING MILES	MILEAGE REIMBURSEMENT RATE	TOTAL MILES	INCIDENTALS/OTHER
2022-03-28	Winooski CCV	90	2	0.585	88.00	0
2022-03-29	Tech Vault	78	0	0.585	78.00	
				0.585	0.00	

Please note that it alerts you to how many days you answered as having traveled in the sentence above the chart. In this instance "You traveled 2 day(s) this month". This corresponds to the number of travel days you entered on page 2. If this number does not match your chart, please use the "Previous" button to return to page 2 to correct the number of days traveled.

Below the chart is the calculation for the reimbursement. It will calculate your total mileage driven, mileage reimbursement, total incidentals, mileage + incidentals, less advance, and total reimbursement.

TOTAL MILEAGE	166.00
MILEAGE REIMBURSEMENT	97.11
TOTAL INCIDENTALS	0.00
MILEAGE + INCIDENTALS	97.11
LESS ADVANCE	
TOTAL REIMBURSEMENT	97.11

In my example there was no advance so this would be eligible for the full reimbursement of $97.11. Click "Next".

Travel GL Codes and Supporting Documents

Once you have completed the previous travel sections you will then be asked to enter GL Codes / Project Codes / Amounts that your travel should be billed to.

Please assign budgetary information for your expenses -

MILEAGE + INCIDENTALS	97.11
LESS ADVANCE	
REIMBURSEMENT TOTAL	97.11

When entering your GL codes for reimbursement the total charged across the GL codes should match the Reimbursement Total

Using the chart provided at the top of this page please fill out the area below –

First GL Code

GL Code *Required*

e.g. 061-60000-60000-54100-000 you must include the dashes and full GL code. (ENTITY - ACTIVITY - PROGRAM - OBJECT - LOCATION)

Project Code - Required Only for Capital Projects

Amount *Required*

Do you require a Second GL Code to bill to? *Required*

No

Please enter the GL code you are billing your travel too, a Project Code (Required only for Capital Projects), and the Amount. If you need to bill to more than one GL code, please select "Yes" on the question of "Do you require a Second GL Code to bill to?". Another section will appear for a second GL code to bill to. You can have up to five GL codes.

Click Next

The last question is for uploading any supported documents. This could be related to whatever you've chosen on your form, Grants, Faculty Professional Development, or just your travel purpose. Click or drag and drop to add files.

Please attach any relevant documents.

DROP FILES HERE OR CLICK TO UPLOAD.

Travel GL Codes Charges Review

Travel GL Codes Charges Review

This page is to review the total charged across GLs for the travel reimbursement. It should match the Reimbursement Total and have a difference of 0 (zero).

SUM BILLED TO GL CODES	97.11
REIMBURSEMENT TOTAL	97.11
DIFFERENCE	0.00

If there is a difference please go back to previous pages and review the data provided.

If there is no difference please proceed with submission of your form.

Please review this chart. It shows the Sum you've billed to GL codes, the reimbursement total, and the difference if there is any. The Sum billed to GL codes is the amount you answered on the previous page for the GL codes to bill your reimbursement too. The Reimbursement Total is your total mileage plus incidentals/other expenses less an advance if there was one.

If this is a difference between your sum billed to GL codes and Reimbursement total then please use the "Previous" button to go back and resolve your mistakes. Note that there is no "Next" button here to proceed.

Travel GL Codes Charges Review Error

You have made a mistake. There is a difference between the Sum billed to GL Codes and the Reimbursement Total.

Ther should be no difference.

SUM BILLED TO GL CODES	97.00
REIMBURSEMENT TOTAL	97.11
DIFFERENCE	0.11

Please use the previous button to go back and resolve the mistake.

Once you have no difference on the Form Page – Travel GL Code Charges Review click "Next."

Final Review

The final page summarizes the information you've submitted for your Travel Reimbursement. You can use this page to review your information before you submit your form.

Once you have reviewed the summary, scroll to the bottom and click "SUBMIT FORM". This will then send your form in to Perceptive Content for approval by your supervisor. You will receive a copy of your submitted form in your Outlook inbox with all the details from this page and a copy of the form that submitted to Perceptive Content.

Your submission is only complete once you click "SUBMIT FORM" and see this confirmation page:
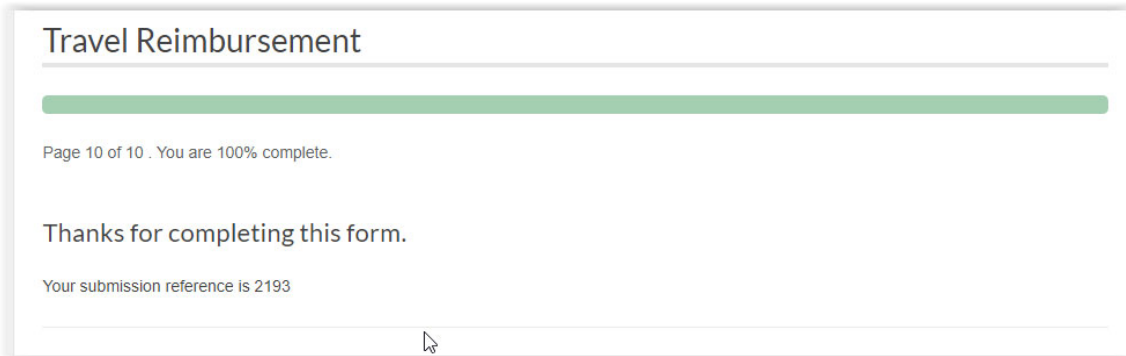
Once successfully submitted, your travel reimbursement form will be given a reference number.

You should also receive a confirmation email with a copy of your form.
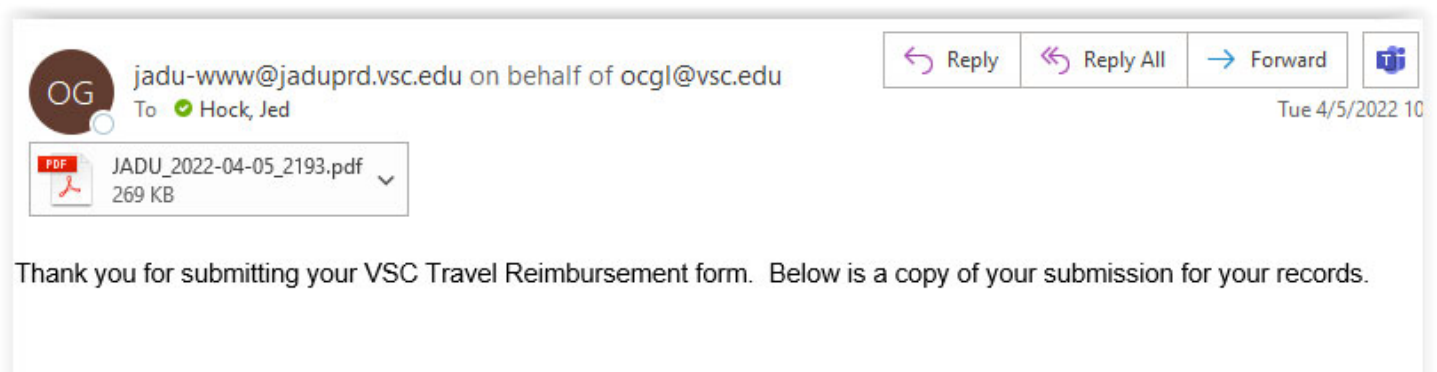
The attached PDF is the completed form and is automatically submitted to Perceptive Content for processing.

This form reference number can also be used to track your submission.

The forms portal provides the ability view your submitted forms, as well as any forms that you started that you didn't complete. You can see the last 10 submitted forms.

From the Account menu at the top after you've signed in – Click on Account
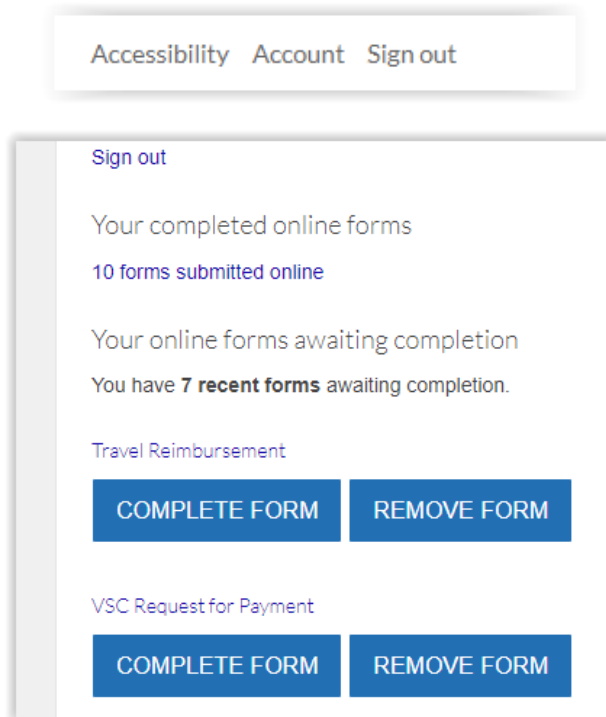
Here you can see your last 10 forms submitted online. I can also see that I have a partially completed Travel Reimbursement form, and Request for Payment form. From here I could either click Complete – to return to this form or Remove it.

It will also present this partially completed form to you and ask if you want to resume it if you time out or for some reason didn't complete the form and it would look like this –
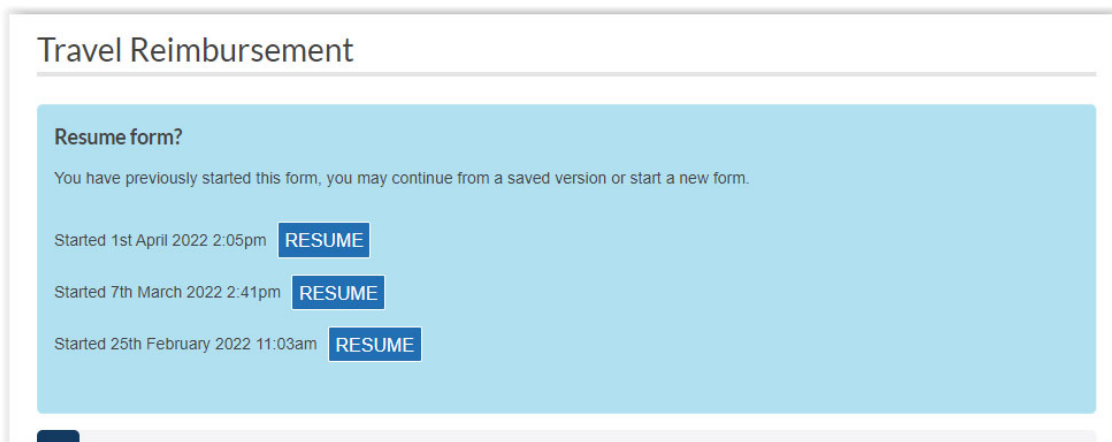
From here you could click Resume and return to a form you didn't complete.

The form will remember any information you put on a page and then click "Next". This writes the data out, if you do not click "Next" when you return to resume a form that page will be blank.

You can fill out the Travel Reimbursement Form as you travel during the month. You will have to use the "Previous" and "Next" buttons to navigate back to Page 2 to the drop down for how many days of travel. Any day you want to record and have retained for resuming the form must have "Next" clicked to go to the following page.