



Request Header

Location for providing general trip information including purpose, dates, destination, and how the trip is financed. Many components of the Header include a tool tip with additional information and guidance on what information is needed. The Header fields are designed to capture information as required by R05.02.060(6)(c).

Slavik, J 10/20-10/25 SEA | Request ID: 4XQU

* Required field

Trip Name * ⓘ Slavik, J 10/20-10/25 SEA	Trip Purpose * ⓘ Professional Development/Training	Trip Description * ⓘ Concur Fusion 2020
Trip Type * ⓘ Alaska	Traveler Type * Staff	*How will you book your travel? * 01. Travel Booking Tool
Final Destination * ⓘ Seattle, Washington	Business Travel Start Date * 10/20/2020	Business Travel End Date * 10/25/2020
Will this trip include personal travel? * ⓘ Yes	Personal Travel Dates * ⓘ 10/26-11/2	
Are any expenses being paid by an external source? * Partially arranged/paid by external so...		
Name of the external source Concur		Estimated amount to be paid by the external source 500.00
Fund * ⓘ (101010) SW General Funds	Org * ⓘ (80042) Financial Systems Oper ...	Department * ⓘ (D8FNSY) Financial Systems
Campus * ⓘ (SW) University of Alaska Statew...	Activity Code Search by Code	
Comments 		

1. **Trip Name** – Use naming convention “Traveler last name, first initial, dates of travel (mm/dd-mm/dd/yy) and airport or city location (e.g. SEA or Seattle)” and condense or abbreviate where appropriate
2. **Trip Purpose** – Use table below to determine best match
3. **Trip Description** – A clear, concise descriptive summary of the work that will be completed and why it needs to be completed; please avoid acronyms and initialisms
4. **Trip Type** – When traveling to more than one business location, use the furthest trip type option; if the trip includes any international travel, choose “International”
5. **Traveler Type** – Defaults based on user’s profile; student employees should change this to “Staff” if travel involves their work assignment (e.g. research assistants conducting fieldwork)
6. **Booking Method** – Select one from the drop-down menu
7. **Final Destination** – Primary (last or furthest) location where business is occurring



8. **Business Travel Start and End Date** – Dates reflect what is required to complete the business-only objective, excludes any personal travel days
9. **Personal Travel** – Select “yes” or “no” and provide dates of personal travel if applicable
10. **3rd Party/External Source Support** – Any business costs not paid by UA, includes self-funded
11. **Funding Source** – Auto-fills with the user’s default funding; if needed, search by code or name and select primary funding source (allocations are assigned through Expected Expenses)
12. **Comments** – Provide any additional required or pertinent information including business justifications such as reason for choosing “Outside Concur/CTM” as the booking method

Trip Purpose: The Trip Purpose field in the Header is one determinant for the account code assigned to employee travel. This table provides descriptions for each Trip Purpose and the corresponding account code. All trips fit within one of the available options.

Trip Purpose	Acct Code	Description
Administrative Activities	2x21	Use this for administrative activities (related to the running of the unit, department, project, or program) for UA or UA programs or projects involving research, instruction, public service, or other institutional activities. EXAMPLE: You are a Systems Office employee traveling to Anchorage to meet with HR staff at UAA about benefit rates.
Athletic Team Travel	2x40	Use this for athletic team travel. EXAMPLE: You are a volleyball coach traveling to Montana for a tournament with your team.
Instruction to UA Students	2x60	Use this for UA instructional delivery by UA faculty or staff to UA students. EXAMPLE: You are a faculty member traveling to the Kuskokwim campus to teach a class.
Lobbying	2190	Use this for influencing legislators or agencies in pursuing policies or programs favorable to UA. EXAMPLE: You are traveling to Juneau to represent UA at an Alaska Senate budget hearing.
Multi-Purpose Trip	N/A	Use this if the trip involves more than one Trip Purpose. Assign the associated, specific Trip Purpose to each individual expense on the Report. EXAMPLE: You are traveling to a workshop to train for working on unmanned aircraft, then you are going to the field to conduct a mapping study. The expenses for the workshop days are “Professional Development/Training” and the expenses for the fieldwork days are “Research/Program Activities.”
Participant Support	3012	Only allowable for non-employees traveling on restricted funding. Traveler Type: Board of Regents, Non-UA Affiliate/Volunteer, or [non-employee] Student



Professional Development/ Training	2x30	Use this for attending (not presenting at) professional conferences, workshops, seminars, trainings, and other educational programs for the purpose of job enrichment, career, or staff development. EXAMPLE: You are a facilities employee traveling to a training for coal plant managers.
Recruitment of Employees	2452	Use this for travel intended to recruit employees. EXAMPLE 1: You are a member of a hiring committee that must travel to conduct a hiring interview. EXAMPLE 2: You are a prospective candidate traveling to Alaska to interview for a position.
Recruitment of Students	2440	Use this for travel intended to recruit students. EXAMPLE: You are traveling to high schools in the Salem, OR area to encourage students to enroll at UA.
Research/Program Activities	2x25	Use this for travel that involves research or program activity including meetings, fieldwork, maintenance/repairs, and attending workshops, conferences, and seminars to present research or provide information about the project. Work related to job duties falls under this purpose. EXAMPLE 1: You are traveling to a remote field site to collect samples for a research project. EXAMPLE 2: You work for Facilities and must repair a boiler in Bethel. EXAMPLE 3: You are a cooperative extension agent giving a canning workshop to residents.
Student Travel	2x70	Use this for non-employee students traveling for the purpose of instruction including workshops, internships, student teaching, conferences, non-athletic competitions, and seminars. EXAMPLE: You are a student in the math program traveling to a scholastic math competition.
Other	2x21	Use this only if expenses do not fall under travel. Specifically, when the travel card is used by mistake for a non-travel expense.

Trip Type: The Trip Type field in the Header is another determinant for the account code assigned to employee and non-employee travel. “Alaska” and “US States & Territories” start the travel account code with 21xx. “International” starts the travel account code with 23xx.

Traveler Type: The Traveler Type field in the Header is also a determinant for the account code assigned to non-employee travel. “Student” assigns 2x70 and “Non-UA Affiliate/Volunteer” assigns 3009. In most cases, this overrides the Trip Purpose account code.

Trip Description: The Trip Description should provide a clear, concise detailed description of the trip that supports a reasonable understanding of the business conducted. The business purpose of a trip may be obvious to the traveler, but not to a third-party reviewer.

For example, “Research for project,” “conducting fieldwork,” “conference,” or “meeting” are too broad. Instead, the description should include the work that will be completed and why it needs to be completed, e.g. “Collecting methane samples from thermokarst lakes,” “Interviewing school district for nutrition survey data collection,” “Attending annual ICCC Conference,” or “Presenting at AGU meeting.”