

Travel Liaison Meeting

Tuesday, September 19th, 2023

I. Welcome & Introductions – RPSU Updates

- As of July 1, 2023: RPSU is no longer processing the following financial transactions:
 - Deposit Processing – now with SDAS
 - LOUIE Student Account Charge Posting – now with SDAS
 - Non-Travel Reimbursements – now with CPRM
- Staffing Updates:
 - CEFNS Travel Specialist – Amanda.McNeal@nau.edu
 - Foreign Travel Coordinator – Sabrina.Goodner@nau.edu
 - RPSU Manager – Melinda.Miller@nau.edu
 - Vacancies: (2) Travel Specialists - COE & FCB/Provost, (1) Assistant Manager

II. FY24 Travel Requirements

- Annual Travel Certification (ATC)
- Authorized Driver (employees and students, only)
 - For Basic Authorized Driver (i.e. non-HOV passenger vehicles) and Specialty vehicles questions: Scott Halle, 928-523-6435 or AuthorizedDriver@nau.edu
- Travel Case Required, *even if no reimbursement to traveler!*
 - Will be an audit finding if there are travel PCard expenses and there is no corresponding approved travel case in the Employee Service Center (ESC)

III. Policy Updates – July 1, 2023

- Employee Travel, PCard Required Purchases
 - Event Registration
 - Airfare
 - Lodging
 - Credit Card Authorizations
 - Travel Rewards Programs

Rewards or “Points” Programs – (example: airline miles and lodging vendor programs): When booking arrangements on the NAU PCard do not enter/use a traveler’s or your personal rewards program, as you will receive a PCard Notice of Violation.

- If a personal payment method is used and the expense is applied to a rewards program, in order for the traveler to be reimbursed, a PCR must be completed and approved in advance of the reimbursement being processed.

IV. Process Updates

- Long-Term Travel Cases, <https://in.nau.edu/rpsu/knowledge-base/>
- Reimbursement Processing – Traveler’s with a Foreign Mailing Address, Non-Employees
 - All reimbursements will be paid via foreign wire transfer, not physical check.
 - Requires (1) Foreign Vendor Authorization form to be completed, and (1) Foreign Wire Transfer form be completed: <https://in.nau.edu/contracting-purchasing-services/forms>
 - This process may require additional processing time.
 - Questions pertaining to form completion and submission: NAU-Purchasing@nau.edu
- Updated TRAVEL Resources – ESC Knowledge Base & CMP/RPSU Websites, *see page 2.*

V. Training Opportunities

- **Travel Optimization Website:** <https://in.nau.edu/rpsu/nau-travel-training/>
 - Travel Policy Training, web module live!
 - Booking Travel Training, offered monthly

VI. How to Escalate Concerns or Questions

- Email RPSU Leadership:
Manager, Melinda.Miller@nau.edu
Assistant Manager, Nicholas.Sanchez@nau.edu

VII. Questions?

Travel Resources – Web:

Employee Service Center: <https://nau.service-now.com/hr>

NAU Fleet Services: <https://in.nau.edu/university-transit-services/fleet-services/>

NAU Policy Library – Travel: <https://nau.edu/university-policy-library/travel-policies/>

RPSU Website – Travel Optimization: <https://in.nau.edu/rpsu/travel-optimization/>

- ✓ Metrics
- ✓ Resource Documents
- ✓ Training
- ✓ Travel Liaison Meeting Notes

Comptroller's Office – Travel Forms & Tools: <https://in.nau.edu/comptroller/travel-forms/>

Comptroller's Office Corner:

- **ESC General Purchase Inquiry:**
[Contracts, Purchasing, and Risk Management](#) → [General Purchase Inquiry](#)
For questions concerning non-travel purchases, invoices, PCard expenses, etc.
- **Employee Moving Expense Reimbursement Allowance (EMERA):**
<https://in.nau.edu/comptroller/forms/>
For questions concerning the EMERA process or troubleshooting the form, please submit a request in the ESC under [Financial Administration and Technical Support Services](#), the type of inquiry will be 'Other'.
- **Unassigned Travel Cases, Case State – Awaiting Approvals:**
Until a travel case is in Ready and assigned to a RPSU Staff member, any emails sent through the ESC or comments left in the case are not sent/viewed by anyone. If you need a case rerouted for approvals please submit a [Financial Administration and Technical Support Services](#) request in the ESC.