

Travel Liaison Meeting

Thursday, November 16, 2023

I. Welcome & Introductions – RPSU Updates

- Staffing Updates:
 - Travel Specialist – Lawson.Nelson@nau.edu
 - Vacancies: (1) Travel Specialist, (1) Assistant Manager

II. Policy Updates & Reminders

- Cost Comparisons – <https://in.nau.edu/rpsu/knowledge-base/>
 - When they are required, examples:
 - Lodging over SAAM/DoD
 - Driving personal vehicle out of state
 - Airfare when personal time is combined with business travel
 - Running the cost comparison correctly:
 - must be for the actual business time if no personal time was involved
 - must show comparable and realistic arrangements
 - must show date and time that the comparisons were run
 - must be run at the same time all other arrangements are made
- FY2023 Travel Reimbursements:
 - Bjorn has requested that anytime a travel reimbursement request is submitted from a previous fiscal year that it will be reviewed by him before proceeding. Those reviews will be routed through the Comptroller.

III. Process Updates

- EC Approval Task - *show & tell*
 - We'd like feedback! Please email Melinda.Miller@nau.edu.
- Submitting Travel Cases on Behalf of a Student or Employee:
 - The traveler has to approve their case prior to it being worked, please remind them!
- NEW! Watchlist Widget – viewable in the My Tickets section (Requests) of the ESC. - *show & tell*
 - Shows all *open* tickets where you are listed on the Watchlist.

IV. How to Escalate Concerns or Questions

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

V. Questions?

Travel Resources – Web:

Travel FAQ – NEW! – *show & tell*

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 – expansion of case counts by department, trip type, etc. in comparison to last fiscal year - *January 2023*
- ✓ Resource Documents
- ✓ Training Opportunities - Attendee Roster, updated weekly (policy) and monthly (booking travel). – *show & tell*
- ✓ Travel Liaison Meeting Notes

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

Comptroller's Office Corner:

- **LFO's and Supervisors – Out of Office or Left Position:**
When supervisors or LFO's will be out of office for an extended period of time (FML, sabbatical, vacation, etc.) or have left their position, please submit a [Financial Administration and Technical Support Services](#) request in the ESC ASAP to have ESC and PeopleSoft Financials routing updated. Don't forget to update their HR Reports To, as needed, as well too!
- **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.