1. Roles

For the purpose of this SOP, the Travel Database POC refers to the OP Budget Lead or designee.

2. References

Office Budget Management
Conference Attendance and Speaking Invitations

3. Procedures

3.1. Identified Travel Needs

A. Planned Travel - Prior to the beginning of each FY, the Travel Database POC will designate a period of time during which OP staff are directed to enter all anticipated travel for the FY. During the designated travel entry period, travelers may edit travel details as needed. After the end of the designated travel entry period, travelers will not be able to modify their travel details in the database.

B. Unplanned Travel - If additional travel is later needed for an unplanned trip, do not enter travel information until the traveler has received confirmation that travel funds are available. Once the traveler is notified that funds are
available, the traveler enters his/her trip in the database as described in Section 3.2.

3.2. Entering Travel

C. Select the “Travel Database” under “Lists” on the OP SharePoint site.

D. Click on “Add New Travel” in order to enter a new trip into the database.

E. Enter the Trip Information as appropriate.

1. **Traveler Name** – The field will auto-populate based on your FDA PIV card. If the user is entering travel on behalf of another traveler, update the Traveler’s name to the name of the traveler.

2. **Event Name** – Use the drop-down button to select from list of events. If event is not listed, add a new event to the drop-down menu.
3. **Staffing Group** – Use the drop-down button to select your respective staffing group.

4. **FY** – Pull down to select the FY, if available.

5. **How Event Supports the Mission** – Provide complete sentences.

6. **Official Travel Start Date** – Click on the calendar function to indicate the day you will begin travel.

7. **Official Travel End Date** – Click on the calendar function to indicate the day you will be returning.

8. **Dates Confirmed** – Indicate with a Y or N if your dates are confirmed at this time.

9. **Location** – Enter the City and State of your destination.

F. Enter the Sub-Projections for the travel costs

1. **Airfare One-Way (GSA link)** – Enter your cost for a one-way flight utilizing Capacity-controlled (-CA) fare.

2. **Lodging per Night (GSA link)** – Enter your lodging cost per night (not including taxes).

3. **Lodging Tax per Night** – Enter the amount of lodging tax per night (estimates are acceptable).

4. **# of Nights** – Auto-filled based on travel dates.

5. **M&IE Per Day (GSA link)** – Enter your daily amount for M&IE.

6. **Car Rental Per Day (GSA link)** – Enter the amount for your daily car rental.
7. **Other Expenses** – This will auto-populate to $150. Change if necessary.

![Image of the OP Travel Database]

G. Once all the sub-projection fields have been entered, the total projected travel cost will auto-calculate, avoiding human error.

H. Once the traveler has satisfied all required fields, select the “Save and Close” button at the bottom of the form.

### 3.3. Modifying Existing Travel Records

The employee should notify the traveler’s supervisor if any of the following conditions develop:
- Trip is cancelled.
- Traveler on planned trip is being replaced by another traveler.
- Change in estimated travel dates is to a different quarter of the FY.

The Supervisor must notify the Travel Database POC. The Travel Database POC will amend or cancel the existing trip as appropriate. If a new traveler will travel in lieu of the original traveler, the Travel Database POC will delete the travel record for the original traveler. The Travel Database POC notifies the new traveler to enter a new travel record in the Travel Database for the trip.

### 3.4. Emergency Travel

If unplanned emergency travel is needed in Q4, the Travel Database POC advises the traveler if any special procedures are necessary because the travel database is being prepared for the upcoming FY’s travel. Emergency travel is any travel in Q4 that was not included in ORM’s emergency travel needs data call.
4. FAQ’s

Q: Why are we entering travel into this database?
A: More precise estimates, accurate data, better tracking, data-mining.

Q: What if I am not sure about when my travel dates will be?
A: You should always enter ‘N’ if you are unsure about your precise travel dates. Additionally, if you are unsure, you should enter dates for the first week of the quarter that you expect to travel. As long as your trip stays within that quarter, you do not need to notify the budget team. Once you are able to confirm your travel dates and the quarter ends up changing, send email to Travel Database POC and he will update the dates.

Q: I am having trouble adding a new event to the event name field. Help?
A: Click on the hyperlink for ‘Click to add an Event not listed in the pull-down menu.’ Afterwards, type in the event name and click ‘Save.’ Then you must close the new window that opened and go back to the travel form in which you click ‘Refresh.’ Your new event name should now be saved to the drop-down menu.

Q: What actually entails my travel start date and travel end date?
A: These dates are the official travel dates for which the traveler is receiving per diem.

Q: What do I do if I need to cancel a trip?
A: Traveler must contact their supervisor, and then supervisor will contact Travel Database POC and notify him/her of the cancellation. Travel Database POC will withdraw the trip from the database and place the record in a folder in SharePoint for records history.

Q: I need to modify my travel dates?
A: If the confirmed travel dates are within the same quarter as the initially entered travel dates, there is no need to have the dates updated. If the confirmed dates fall within a different quarter from the initially entered travel dates, the traveler must contact their Supervisor who in turn notifies the Travel Database POC and requests that he/she update the travel dates.
Q: There is a trip that I need to attend. Do I need supervisory approval or can I just go ahead and enter it into the database?

A: If there is a trip you’d like to attend, you must first get approval from your supervisor. Your supervisor will email Travel Database POC. Travel Database POC will then confirm if funds are available and will notify the traveler that he/she may enter his/her travel in the database.

Q: Employee 1 is supposed to go on a trip, but something occurred prior to the travel start date and the employee can no longer attend. Employee 2 is assigned to go on this trip in place of Employee 1. What should Employee 2 do?

A: When the Supervisor has reassigned the trip, the supervisor will notify Travel Database POC of the change in trip traveler. The Travel Database POC will delete the old record for Employee 1 and will prompt Employee 2 to enter her travel in the database.

5. Document History

<table>
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<th>Status* (D, I, R, C)</th>
<th>Date</th>
<th>Author Name and Title</th>
<th>Approving Official Name and Title</th>
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<td>I</td>
<td>11/07/2016</td>
<td>Adam Betman, Program Analyst</td>
<td>Alan Tart, Deputy Director</td>
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<tr>
<td>1.1</td>
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<td>1/13/2017</td>
<td>Adam Betman, Program Analyst</td>
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<td>1.2</td>
<td>R</td>
<td>06/06/2017</td>
<td>Adam Betman, Program Analyst</td>
<td>Matthew Avis, Acting Supervisor</td>
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* - D: Draft, I: Initial, R: Revision, C: Cancel

6. Change History

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<th>Change</th>
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</thead>
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<td>New Document</td>
</tr>
<tr>
<td>1.1</td>
<td>Correct spelling error in section 4. Add hyperlink to OP-IO.005. Section 3.1 B Add “Once the traveler is notified that funds are available, the traveler enters his/her trip in the database as described in Section 3.2.” Section 3.4 Add “Emergency travel is any travel in Q4 that was not included in ORM’s emergency travel needs data call.”</td>
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<tr>
<td>1.2</td>
<td>Update SOP number reference for OP-IO.005 to OP-IO-SOP.005 and add reference to OP-IO-SOP.002 Conference Attendance and Speaking Invitations</td>
</tr>
</tbody>
</table>
List of Attachments

Attachment A - Travel Database Workflow ................................................................. 8
Attachment A - Travel Database Workflow

1. Employee accesses OP Travel Database

2. Select "Add New Travel"

3. Change the traveler's name if not self

4. Is event listed in Event Name dropdown?
   - Yes
     - Select Event Name
   - No
     - Enter Event Name

5. Enter Trip Data

6. Select "Save and Close"

7. Select Event Name

8. Is event in pull-down menu?
   - Yes
     - Click to add an Event not listed in the pull-down menu
   - No
     - Enter Event Name

9. Hit "Save"

10. Select "Refresh" to show added event in pull-down menu

11. New traveler adds new Travel Database record.

12. Is the trip cancelled?
    - Yes
      - Employee notifies Supervisor
      - Supervisor Notifies Travel Database POC
      - Travel Database POC removes record from database and adds trip to Cancelled Trip list
    - No
      - Supervisor notifies Travel Database POC
      - Travel Database POC updates trip actuals

13. Are the travel dates changed to a different FY quarter?
    - Yes
      - Employee notifies Supervisor
      - Supervisor notifies Travel Database POC
      - Travel Database POC modifies trip details in Travel Database
    - No
      - Employee travels

14. Travel Database POC removes record for cancelled traveler trip

15. Is there a change in traveler?
    - Yes
      - Employee notifies Supervisor
      - Supervisor notifies Travel Database POC
      - Travel Database POC removes record from database and adds trip to Cancelled Trip list
    - No
      - Employee travels

16. Travel Database POC modifies trip details in Travel Database