

# ANNUAL TRAVEL WORKSHOP

December 4, 2012



Attendees will receive credit for  
meeting the GEN016 Training Requirement

# AGENDA

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- Host/Sponsor Recognition
- Introductions
- Opening Remarks
- DOE Guidance to Conference Management
- Linking events to Travel Authorizations
- International Services Updates
- Closing Remarks
- Drawings
- Foreign Travel

# 2012 SPONSORS

- Host
  - CI Travel
- Sponsors
  - Omni Hotel
  - National Rental Car
  - Courtyard of Newport News and Residence Inn
  - Comfort Suites at the Airport
  - Hampton Inn & Suites
  - Courtyard at Yorktown
  - Comfort Inn at Patrick Henry Mall
  - Savannah Suites



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# INTRODUCTIONS

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# Opening Remarks

by

Joseph Scarcello

Chief Financial Officer

[Load Pams slides](#)

# WHAT'S BEING TRACKED?

- Improper Payments
  - Reg fee paid by traveler via credit card but TA shows payment requested to be paid by Jlab
- Due Diligence
  - Rental car vs. airport shuttle services
  - Hotel is best value available (FED-RATE)
  - Airfare is lowest available that meets the mission, regardless of airline



# CUSTOMER SERVICE

- Rearden questions are to be directed to [e-solutions@citavel.com](mailto:e-solutions@citavel.com)
- Actual Lodging Forms are to be attached to the TA and approved prior to travel. Notification of approval/disapproval will be sent via email to the TA preparer.
  - If attached after TA is in submitted status, notify travels
- When calling Travel – leave a detailed message
  - If multiple questions, state you will send email with questions
  - Send email to [travels@jlab.org](mailto:travels@jlab.org) in case person is absent

# Conference Management





# Conference Terms

- DOE Conference Guidance
  - See Travel, Conference webpage
- Definition of a Conference
  - See Travel, Conference webpage
- DOE Conference Tool
  - All Jlab events entered 60 – 120 days before
- Conference Close Date
  - Entered when event closed in DOE
- Lock Out Date
  - Usually 60 days but can be earlier



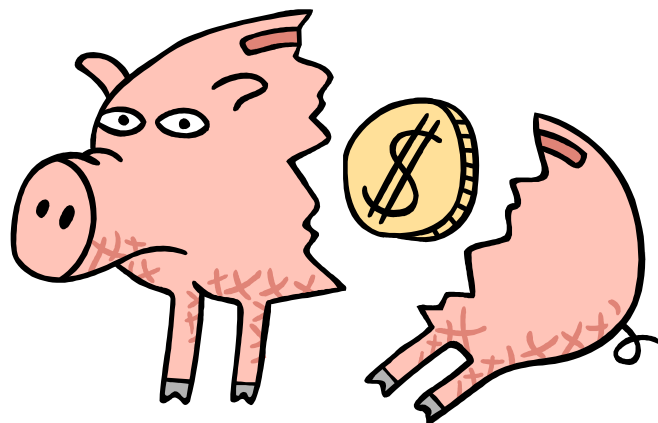
# Guidance

- Each Laboratory track and report conferences
- Report all conferences (minimum 60 days prior to start date)
- Update prior to close date or upon receipt of lock out notification
- Determine necessity for approvals (total attendance from all labs > \$100,000)
- If no approval necessary – TA's will be approved
- If approval necessary – DOE prepares papers for Deputy Secy.
- Approval can take up to 60 days
- No DOE funded expenses can be incurred without TA approval

# Jlab Collection Tool

- Event Database
  - Requires: type, title, dates, location, sponsor, purpose
  - New field: VENUE – if unknown, enter “Unknown at this time”
  - Close Date – when entered will lock ability to enter additional projections and display an error message
- Projected Attendee Database
  - Requires: event, name of participant, charging, reason for attending, estimated cost
  - Reason for attending should not be attendee unless it is a student or non-DOE funded attendee

# DOE Conference Tool



# Requirements for Entry

- Title of event
- Start/End Dates
- Location
- Sponsor
- Venue
- Purpose (Focus/objective)
- Projected attendance
  - presenters or other participants recommended
  - attendee's may be rejected or asked for reason



# Timing of Entry

- Event must be in database at least 60 days prior to start date
- If event already in database, event will be locked at least 60 days prior to start date.
- What happens if event is locked and we have more people?
  - Only DOE can unlock the event to add more people
  - If total of all attendees is over \$100k DOE may reject

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# INTERNATIONAL SERVICE OFFICE UPDATES

Presented

By

Tammy Frye

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# CLOSING REMARKS

By

Lyn Wells

Deputy Chief Financial Officer



# VENDOR DRAWINGS

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- Omni Hotel
- Towne Place Suites
- National Rental Car
- Courtyard of Newport News and Residence Inn
- Comfort Suites at the Airport
- Marriott Hotel at City Center
- Hampton Inn & Suites
- Courtyard at Yorktown
- Comfort Inn at Patrick Henry Mall
- Savannah Suites