

# State of Ohio

## MyTravel Procedures



**OBM  
Shared Services**

This pamphlet contains a summary of amended Rule 126-1-02 of the Ohio Administrative Code.

Refer to the travel rule for complete information and requirements at:

[obm.ohio.gov/wps/portal/gov/obm/areas-of-interest/  
agency-overview/obm-travel-rule/obm-travel-rule](https://obm.ohio.gov/wps/portal/gov/obm/areas-of-interest/agency-overview/obm-travel-rule/obm-travel-rule)

Rev. 9/13/19

# The OBM Travel Rule

The OBM Travel Rule was revised on September 1, 2019. To support the changes made to the rule, the state leveraged processes that have been used successfully at the federal level and deployed in other states.

## Highlights of the OBM Travel Rule include:

- The State will reimburse based on rates for lodging within the Continental United States (CONUS) set by the federal General Service Administration (GSA).
  - Maximum rates for lodging are set by location.
  - Per diems for meals & incidentals are set by location.
- International travel will be reimbursed on actual expenses within reason.
- Employees are expected to submit travel and expense reimbursement requests within 60 days of travel. In no case shall an employee be able to submit a request for reimbursement after 90 days.
- OBM Director retains discretion to establish mileage reimbursement rate and review on a quarterly basis.
- The State of Ohio Travel Card program has been discontinued and no new cards will be issued. Current cardholders may retain their cards and use them.
- All travel reimbursement will be made via EFT to the same bank account that an employee has established for his or her state pay.

To view and print the full Travel Rule go to:

[obm.ohio.gov/wps/portal/gov/obm/areas-of-interest/ agency-overview/obm-travel-rule/obm-travel-rule](https://obm.ohio.gov/wps/portal/gov/obm/areas-of-interest/agency-overview/obm-travel-rule/obm-travel-rule)

To view all Travel and Expense Procedures, visit the OAKS FIN Manual:

[finsource.ohio.gov](https://finsource.ohio.gov)

**Travel authorizations are only required when reimbursement includes claims for lodging, airfare, car rental, or international travel.**

## Step 1 - Create Travel Authorization (Traveler)

1. Go to [MyOhio.gov](https://myohio.gov) website
2. Enter your **OH|ID Workforce User ID & Password**, Sign In
3. Click **My Workspace > MyTravel** listed under Self-Service Quick Access
4. Click **Create/Modify** under Travel Authorizations
5. Enter **Employee ID**
6. Click **Add** - The Travel Authorization Entry page will display
7. For **Description** enter a short reason for travel
8. For **Business Purpose** click the arrow & select:
  - **Conference**
  - **General Travel and Expense**
  - **Off-Site Meeting, or**
  - **Training**
9. Click Magnifying glass in the **Default Location**. Select search criteria from **Search by:** dropdown window. Type the first three letters of the trip location in the **begins with** field
10. Click **Look Up**
  - If incorrect or no information is provided, Click: **Advanced Lookup**
  - Select the **Expense Location** from the **Search Results**
11. Enter Travel start date in **Date From**
12. Enter Travel end date in **Date To**
13. Enter additional trip information in **Comments**
14. Click **Attachments** to add relevant files
15. Complete the Details section:
  - a. For **Expense Type**, click the dropdown menu to select the applicable expense type for a Travel Authorization:
    - **Airfare**
    - **Automobile Rental**
    - **International Travel, or**
    - **Lodging and/or Conference Lodging**
  - b. Enter **Amount** for expense type
  - c. Select **Payment Type**
  - d. Click **Detail**
  - e. Complete all fields within the **Details** section.

- f. Click the **Check Expense for Errors**
  - g. Click **Return to Travel Authorization Entry**
  - h. Select another **Expense Type** on the next row, if necessary
  - i. Click here to copy repeated rows
16. Click **Update Totals**
  17. Click Submit – A **Save Confirmation** window will appear with an Authorization ID number.

## Step 2 – Approve Travel Authorization (Supervisor)

1. Go to [MyOhio.gov](https://myohio.gov) website
2. Enter your **OH|ID Workforce User ID & Password**, Sign In
3. At Financials, click **Launch Application**
  - The OAKS Financials page displays
4. Click **Main Menu > Manager Self-Service > Travel and Expense Center**
5. Click **Approve Transactions** under Approvals
6. Click **Travel Authorizations** tab
7. Click the **Transaction ID - TA Summary** page displays
8. Review the traveler's planned expenses
9. Click **Expense Type** to view expense details – The About This Expense page displays
10. Click **Return to Travel Authorization Summary** when done viewing
11. Enter **Comments** (if sending back or denying TA)
  - Click Return to Approval List (if planning to Send Back or Hold)
12. Click **Approve** - the Submit Confirmation page displays
13. Click **OK**

## Step 3 - Create Expense Report (Traveler)

1. Go to [MyOhio.gov](https://myohio.gov) website
2. Enter your **OH|ID Workforce User ID & Password**, Sign In
3. Click **My Workspace > MyTravel** listed under Self-Service Quick Access
4. Click **Create/Modify** under Expense Reports

5. Click **Add**
6. Click **Select** for a specific trip, the Create Expense Report page appears.
7. Select the **Business Purpose**
8. Enter a brief **Report Description**
9. Enter a **Default Location**
10. Click the **Attachments** icon
  - Click **Add Attachment** > Click **Choose File** > Select file from desktop, click **Open** > Click **Upload** > Enter short Description > Click **OK**
  - Always attach receipts at header section using the **attachment link**
11. Click **Expand All**
12. Modify the **Expenses** to reflect actual expenses paid
13. Add/modify the **Description** field
14. Select appropriate **Payment Type** from the dropdown menu
15. Add/modify the **Amount** field
16. Add items by clicking **Insert Line** icon (plus sign); Click **OK**
17. Delete items by clicking the **Del** icon (minus sign); Click **OK**, if necessary
18. Submit Expense Report by clicking **Summary and Submit** > **Check box** > **Submit Expense Report**
19. Save confirmation page displays
20. Click **OK**

## What Happens Next:

OBM Shared Services **pre-audits** travel expense reports to ensure compliance to the OBM Travel Rule. An email notification is sent to the traveler when an expense report passes pre-audit.

Reimbursements are direct deposited into the traveler's bank account within **7-10 business days** after approval email notification is sent.

# First time user of the OAKS Travel Module?

Step-by-step directions are provided in the FIN Process Manual under Travel and Expense:

[finsource.ohio.gov/](https://finsource.ohio.gov/)

## Reminders

A state employee shall not be reimbursed for mileage commuting from his/her residence to his/her headquarters, or from his/her headquarters to his/her residence.

Information on creating a Travel Authorization for new CONUS rates is not available from June through early September.

To view and print Frequently Asked Questions on the Travel Reimbursement Process go to:

[ohiosharedservices.ohio.gov/TravelExpense/faq.aspx](https://ohiosharedservices.ohio.gov/TravelExpense/faq.aspx)

If having difficulties creating a travel authorization or expense report, try clearing your cache and/or use a different browser (Internet Explorer, Chrome, FireFox, etc.).

## Contact Us

**Questions? Please contact:**



**OBM  
Shared Services**

Phone: (614) 338-4781  
1-877-OHIOSS1 (1-877-644-6771)

Email: [Ohio.SharedServices@obm.ohio.gov](mailto:Ohio.SharedServices@obm.ohio.gov)

For more information on the travel and expense process or the OAKS Travel and Expense training module, please visit the OSS website:

[www.OBM.Ohio.Gov/SharedServices](https://www.OBM.Ohio.Gov/SharedServices)