TDOT Workforce Development
Out-Service Training Request Form (IN-STATE)

*Updated 2021.10.22 *Field is required on the TA.*

Instructions

*For Out of State Travel see below:

If the training will be held out of state, then please complete the Out-of-State Travel Authorization Form and Edison Out-of-State Travel Authorization.

An Out-Service Training ("TA") **is** required when:

a. A TDOT employee is going to attend any scheduled conference, seminar, training program, etc. ("Event") for which TDOT will be paying Travel expenses and/or a Registration Fee (exception: see point a. below about in-state Events with no registration fee.)
b. A TDOT employee has successfully completed a professional examination and is requesting reimbursement for the cost of review courses taken to prepare, in accordance with DOHR policy #12-031.

A TA is **not** required when:

a. A TDOT employee is going to attend an ***in-state*** Event for which TDOT will not be paying a Registration Fee (out-of-state events with no registration fee still require a TA.)
b. An employee or division submits a request/proposal for future training that has not yet been scheduled. (Once such training has been approved and scheduled, the coordinator must re-assess whether a TA is needed.)

All TAs should be submitted *as early as possible*, and no less than **three** weeks prior to the Event Start date for in- state Events or no less than **six** weeks for out-of-state Events. Failure to comply with this standard may not allow sufficient time for approval, which would result in the employee being unable to attend the Event. All TAs must be completed and submitted electronically; paper forms will not be accepted.

When multiple employees will be attending the same in-state event, it is recommended to complete one TA for all employees in the same HQ Division or Region unless they will have different Travel Information and Estimated Expenses – all employees covered on a single TA must have the same Travel Information and Estimated Expenses. See "Completing the Multiple Employees Spreadsheet" instructions below.

To complete each TA, use information provided by the Event's organizers (websites, brochures, quotes, etc.) and from the Finance Office's intranet page (https://www.teamtn.gov/tdot/tdot-finance/state-travel-information.html). Review the FAQs at the end of this document as needed. Always refer to the statewide travel (https://www.gsa.gov/travel/plan-book/per-diem-rates) for current details regarding reimbursement eligibility, reimbursement rates, and other policy-related information.

Completing the TA Form (Form Breakdown)

*Do not enter anything in the "Form #" field. This will be completed by HR.
*In the "Created" field, enter the date the form is being filled out.

I. **Employee Information** – Complete all fields in this section with the information pertaining to the employee who will be attending the event. The values entered must match the employee's Edison profile, as shown on his/her paychecks. If the assigned Department ID and/or Official Job Title do not appear in the respective lists, please contact Human Resources to verify the employee's official work assignment.

A. *First Name – Enter the employee's entire First Name (or Middle Name) *as found on the Edison profile*. If completing this TA for multiple employees, enter "See Attached" and leave the remaining fields in this section blank. Otherwise, complete all the fields.

B. Last Name – Enter the employee's entire Last Name. Include any suffixes (Sr, Jr, III, etc.).

C. Employee ID – Enter the employee's 8-digit Employee ID number (Format: 00123456).

D. Bureau/Region – Select the employee's Bureau/Region from the dropdown list.
Note: This field must be completed for the next two fields to function.

E. Department ID – Select the employee's 10-digit Department ID from the dropdown list.

F. Official Job Title – Select the employee's Official Job Title from the dropdown list.

G. State Email Address – Enter the employee's email address ending in *@tn.gov*.

H. State Phone Number – Enter the employee's work phone number (not the department's main phone line or the phone number of anyone else who may be completing the form).

II. **Travel Information** – Review the travel regulations and FAQs as needed in order to complete this section.

A. *Nearest Official Station – Select the option closest to the employee's assigned daily reporting location, or select "Other" and enter the employee's assigned daily reporting location in the blank that will activate beneath the drop-down field.

B. Destination – Enter the location of the event.

1. *City – Enter the City closest to the event location.
2. State – Select the State, if any, in which the event will primarily be held.
3. Zip Code – Enter the Zip Code, if any, in which the event will primarily be held.

C. Round Trip Distance – Enter the estimated round trip distance, in miles, from the Nearest Official Station to the Destination City.

D. Event Name – Enter the title of the conference, seminar, training program, etc.

E. Dates – Enter each applicable date. See FAQs for information about "non-standard" date entries.
1. Event Start – Enter the first day that the employee will actually attend the Event.
2. Event End – Enter the last day that the employee will actually attend the Event.
3. Departure – Enter the day the employee will begin traveling to the Destination.

4. Return – Enter the day the employee will arrive back at his/her home or Official Station, as applicable.

F. Justification for Travel – Briefly describe the purpose/topic(s) of the Event, and the job-related benefit the employee will gain from attending.

III. **Estimated Expenses** – Review the travel regulations and FAQs as needed in order to complete this section.

A. Source of Funding – Enter the appropriate percentages indicating the Source of Funding for the employee's total cost to attend the Event. Total must equal 100%. List any expenses to be paid by TDOT as "State" funding.

B. Expense Table – Enter the appropriate Travel and Registration information. Note the following:
a. For Lodging and Meals, enter the information for a ***single*** employee, *even if* the TA is actually covering multiple employees.
b. For Transportation, Other, and Registration Fee, enter the **total** amount for *all* employees covered by the TA.
c. Every cell in the "Total" column is read-only except for Number of Employees, Transportation, Other, and Registration Fee.
d. Every cell in the "Total" column must match the applicable supporting documentation - do not round these amounts for any reason.

C. Lodging – Enter the anticipated Number of Days the employee will need lodging and the estimated Cost per Day, including listed fees and taxes associated with the overnight stay. If no overnight travel is required, enter "0" Days and "0" Cost.

D. Meals (1st & Last) – Enter the anticipated Number of Days the employee will receive 75% meal reimbursement and the estimated Cost per Day.

E. Meals (All Other Days) – Enter the anticipated Number of Days the employee will receive 100% meal reimbursement and the estimated Cost per Day.
a. If fewer than two overnight stays are required, enter "0" Days and "0" Cost.
b. If two or more overnight stays are required, enter the estimated Days and estimated Cost.

F. *Number of Employees – Enter the number of employees being covered on the TA.

G. Transportation – Select the primary mode of Transportation that will be used and the estimated cost.

H. Other – Enter any other expenses (rental vehicle, taxi, rideshare, parking, etc.) and the estimated total cost.

I. Registration Fee – Select the appropriate Registration Fee option, and enter the applicable amount. If there is no Registration Fee, select "N/A" and enter "0."

J. Charge Travel Expenses To – If there are no Travel Expenses, select "N/A." Otherwise, select "Dept ID" and enter the employee's own Dept ID unless there is supporting documentation that it should be charged to a different Dept ID, TX Number, Project Number, or Other.

K. Charge Registration Fee To: If there is no Registration Fee, select "N/A." Otherwise, always select "Dept ID" and enter "4026230000" except as follows:

L. Select "TX Number" and enter "TX00260304" if the Event is one of the following:
1. AASHTO conference or committee meeting
2. Forklift Training
3. Snow Plow Training

4. Workzone Safety Training
5. ROADEO Training
6. FHWA-NHI Training
ii. Select any dropdown option and enter the specific payer if there is supporting documentation. Also, change the source of funding to "Other."

IV. **Supporting Documentation and File Submission**

A. Compile all supporting documentation as indicated by the checklist attached to the form. Additionally:
1. Complete the Multiple Employees spreadsheet, if applicable, using the instructions on page 4 below.
2. Complete any division-specific documentation, as required.

B. Using the "Organize Pages" tool, combine all required documentation (*except* the TA Spreadsheet for multiple employees, if applicable, which should stay in excel format) into a single, separate PDF file in the order indicated by the checklist on page 2 of the form.

C. Save the file with the Event Start date as “Year.Month.Day” and then indicate the individual, division, region, or bureau being covered by the TA.
Examples:
2019.11.06 Andrews, Andrea
2020.12.19 (Long Range Planning)
2019.01.07 (Region 2)
2020.02.24 (Administration Bureau)

D. "Print" the TA form with the marked checklist page to Adobe (printing to PDF allows for signatures, while the fillable form does not). Add both pages of the TA form to the front of the file created in Step IV.B.

E. Follow any division-specific procedures for obtaining the authorized Division Director signature. It is *highly recommended* that the form be sent and signed electronically.
1. If the file is "(SECURED)" after the Division Director digitally signs it, then it will need to be "printed" to PDF again (The division Training Coordinator, if any, should review the file to ensure correct and
complete information and supporting documentation.

F. Email the file (and the Multiple Employees spreadsheet, if any) to the HR Admin (see Page 6). Enter the Subject Line as “TA – [Filename]”
Example: *TA – 2020.03.30 (Engineering Bureau - Region 1 and Region 2)*
Note – The following submissions will not be accepted and will be returned for corrections:
1. Hardcopy files, or TAs completed by hand
2. Files with incorrect or incomplete information/documentation
3. Emails with more than one attachment (other than the Multiple Employees spreadsheet)

Completing the Multiple Employees Spreadsheet

For In-State events, It is recommended to complete one TA for all employees in the same HQ Division or Region unless they will have different Travel Information and Estimated Expenses.

If TDOT will be paying Travel expenses, all employees covered on a single TA must have the same Travel Information and Estimated Expenses. If multiple employees are being covered on a single TA, all of them must be listed on the Multiple Employees Spreadsheet.

1. ***For correct formatting:*** Before entering any data, highlight cells A4-J4. Grab the bottom-right corner, and drag the cells down until the number of rows is equal to the number of employees being covered by the corresponding TA form.
2. Enter each employee's information according to his/her current record in Edison (i.e., enter the legal name, not a nickname). All fields are required.

Note:
It is acceptable to copy-paste First Name, Last Name, Empl ID, Dept ID, State Email Address, and State Phone Number from current Edison records such as a Staffing Pattern or Alpha Roster. However, when doing so, please use the Special Paste option "Values Only" so as not to overwrite the spreadsheet's formatting.

Each unique value in Bureau/Region and Official Job Title must be entered manually. Once the first instance of a value has been entered, it is acceptable to copy-paste that value within the same worksheet.

The Bureau/Region field must be completed for the Department ID dropdown field to function. For technical reasons, it is not possible for these values to have spaces or special characters. Therefore, the options are not written in standard format, and do not exactly match the corresponding options on the TA.

If the employee's assigned Department ID and/or Job Title do not appear in the respective lists, please contact Human Resources to verify the employee's official work assignment.

3. Enter the amount of the Registration Fee for each employee.

4. Verify that the Total Registration Fee matches the amount entered on the corresponding TA form.

5. Save the spreadsheet with the same name as the completed .pdf TA file (See Step IV.D above) and proceed to Step IV.A.2 above to complete the submission.

Frequently Asked Questions

Q: What do I do once my TA has been submitted to the HR Admin?
A: Wait two weeks. If you have not heard anything by then, email and ask for an update. Also, pay attention to your email in the meantime in case any corrections are needed for processing the TA.

Q: How will I know when my TA has been approved? Then what do I do?
A: Each TA must approved by HR, the Bureau Chief, the Commissioner, and Finance. Then . . .

• If there is no registration fee on an in-state TA, or if the fee will be paid by the employee and reimbursed, HR will send the employee a copy of the completed TA and tell them to register themselves.
• If there is a registration fee and the Event is being held in Tennessee, HR will notify Accounts Payable staff to complete the registration and cc: the regional Training Specialist or the individual employee (for HQ).
• If there is a registration fee and the Event is being held out of state, the Budget Office will notify Accounts Payable staff to complete the registration and cc: the regional Training Specialist or the individual employee (for HQ).
• If the employee needs to submit an expense report after the Event, the signed TA will need to be attached.
*If the employee needs to submit an expense report for an in-state event that had no registration fee, the employee will need to attach an official brochure and/or agenda in lieu of a TA

Q: Can I get a rental car?
A: It depends. Please refer to the Department of Finance and Administration's Policy 8 found at https://www.tn.gov/content/dam/tn/finance/documents/fa_policies/policy8.pdf. If your circumstances do allow for a rental car, we have a contract with Enterprise. For customer service, contact Gerald.D.Sims@ehi.com (615.371.9524).

Q: What supporting documentation is needed for lodging?
A: If the traveler is using a non-conference hotel, a justification memo signed by the Bureau Chief is needed. If the traveler is using a conference hotel, only a brochure confirmation from the event website is needed.

Q: Can I be reimbursed for mileage and/or fuel purchases?
A: It depends. Please refer to the *Motor Pool Policy and Procedures* (Policy 220-03) found at https://www.teamtn.gov/content/dam/teamtn/tdot/hr/policies/220-03.pdf. For current motor pool vehicle availability, call 615.741.7750.

Q: What if I need to make a change to a TA I've submitted?
A: If the TA has already been submitted to HR, notify the HR Admin ASAP to disregard the TA (provide the original file name). Then revise or re-do the form, following any division-specific guidelines, and re-submit in a *new* email.

Q: Who should I contact if I have questions about filling out an expense report?
A: The Travel Claims Manager

• Travel Claims (Centralized Accounting) – Veronica.Davis@tn.gov (615.741.7795)
• Budget Manager – Tony.Woods@tn.gov (615.532.8209)
o Out-of-State Travel Approvers
▪ Tran.Lim@tn.gov (615.741.3906)
• Learning & Development Manager – Avery.Poor@tn.gov (615.532.3783)