PROCEDURE

Authority: POL-U5348.10
Effective Date: January 21, 2014
Authorized and Reimbursing Travel for Official University Business
Approved By: Director, Procurement/Business Services

Cancels:
See Also: PRO-U5348.10B Requesting Travel Authorization for Non-Employees
PRO-U5348.10C Reconciling and Reporting Travel Expenditures
PRO-U5348.10D Requesting, Reconciling, and Collecting Advances (under development)
FRM-U5348.10A Traveler Profile and Acknowledgement Form
FRM-U5348.10B TEM Data Entry Maintenance Form
FRM-U5348.10C TEM Supervisor Approver Maintenance Form
FRM-U5348.10D Proxy Approver Maintenance Form
FRM-U5348.10E Blanket Travel Authorization Request Form

Website Travel Services

PRO-U5348.10A REQUESTING TRAVEL AUTHORIZATION FOR EMPLOYEES OR GROUP TRAVEL

Action by: Action:
Traveler or Group Lead Traveler 1. Contacts Travel Services to coordinate required Traveler Acknowledgement training.
   Exception: Training is required only once while employed by the University. If Steps 1 - 6 have already been completed, go to Step 7 below.

2. Completes training.

3. Signs the Traveler Profile and Acknowledgement form (FRM-U5348.10A) and submits to appropriate supervisor.

Supervisor 4. Completes Section IV of form and forwards to Travel Services.

Travel Services 5. Receives form and reviews for completeness.

6. Registers Traveler and creates the Traveler profile in TEM based on information on the form.

Traveler/Lead Traveler 7. Refrains from making any payments or financial commitments for travel-related purposes until receives email from TEM system stating TA has been approved.
PRO-U5348.10A Requesting Travel Authorization for Employee or Group Travel

**PROCEDURE**

<table>
<thead>
<tr>
<th>Action by:</th>
<th>Action:</th>
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<tbody>
<tr>
<td>Traveler/Lead Traveler (cont.)</td>
<td>8. Takes the following actions <strong>when applicable:</strong></td>
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<td></td>
<td>a. <strong>Follows</strong> any internal department or division procedures that require obtaining authorization prior to submitting a TA through TEM, and/or</td>
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<td>b. <strong>Submits</strong> the <em>Blanket Travel Authorization</em> form (FRM-U5348.10E).</td>
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<td>9. If anticipates the need to request a travel advance, <strong>understands</strong> that:</td>
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<td>a. The Traveler is responsible for reconciling all expenses and repaying any unexpended portion of an advance by the 10th day of the month following the close of travel, and</td>
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<td>b. Unpaid or unreconciled balances are subject to income tax, interest, and immediate collection by the University.</td>
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<td>Traveler/Lead Traveler or assigned data entry personnel</td>
<td>10. When a travel authorization is needed, <strong>accesses</strong> TEM system by following <strong>TEM guides</strong>.</td>
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<td>11. <strong>Fills</strong> out TA request on-line and includes all anticipated expenses.</td>
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<td>a. If assigned data entry personnel initiates TA, <strong>selects</strong> “Traveler Review” to forward TA to the Traveler/Lead Traveler.</td>
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<tr>
<td>Traveler/Lead Traveler</td>
<td>12. <strong>Ensures</strong> TA is complete and accurate.</td>
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<td>13. <strong>Submits</strong> TA request to Travel Services for approval via TEM.</td>
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<td>Travel Services</td>
<td>14. <strong>Receives</strong> electronic notice to review a TA request.</td>
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<td>15. <strong>Takes</strong> one of the following actions:</td>
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<td>a. <strong>Approves</strong> TA if it meets requirements and <strong>goes to</strong> Step 17,</td>
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<td></td>
<td>b. <strong>Returns</strong> TA to Traveler/Lead Traveler for correction and <strong>repeats</strong> Steps 12 - 14, or</td>
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</table>
c. Denies TA to permanently terminate request and returns to Step 7 if a new request is to be initiated.

16. Follows PRO-U5348.10D if a travel advance is requested.

17. Receives electronic notice to review a TA request.

18. For international travel or travel to Hawaii:
   a. If the “supervisor” role for TA’s has been delegated, the delegate must obtain the official supervisor’s written approval outside of TEM (i.e. approval via email).
   b. The written approval must be filed with the TA via Nolij.

19. Takes one of the following actions (using TEM guides if needed):
   a. Approves TA if it meets requirements and goes to Step 20,
   b. Returns TA to Traveler/Lead Traveler for correction and repeats Steps 12 - 17, or
   c. Denies TA to permanently terminate request and returns to Step 7 if a new request is to be initiated.

20. Receives electronic notice to review a TA request.

21. Takes one of the following actions (using TEM guides if needed):
   a. Approves TA if it meets requirements and goes to Step 22,
   b. Returns TA to Traveler/Lead Traveler for correction and repeats Steps 12 - 20, or
   c. Denies TA to permanently terminate request and returns to Step 7 if a new request is to be initiated.
Action by: Traveler/Lead Traveler  

Action:  

22. **Receives** electronic notice the TA has been approved.  

23. **Reviews** Travel Services [website](#) for important information on ethics, rule compliance, safety, and other related procedures such as purchasing with a Department Travel Card.  

24. **Makes** necessary travel arrangements including paying for expenses as allowed.  

25. Upon return from travel, **follows** procedures:  
   
   • PRO-U5348.10C **Reconciling and Reporting Travel Expenditures**, and  
   
   • PRO-U5348.10D **Requesting, Reconciling, and Collecting Advances** (if applicable)  

Action by: Supervisor and Budget Authority  

Action:  

26. In accordance with section 5 of the travel policy, **ensures** department procedures are in place for reviewing TA’s approved by an assigned proxy.  

Action by: Proxy  

Action:  

27. **Follows** department procedures for reviewing TA’s approved on behalf of a supervisor and/or budget authority.