

PROCEDURE

Effective Date: January 21, 2014
 Approved By: Director, Procurement/Business Services

Authority: POL-U5348.10
 Authorizing and Reimbursing Travel
 for Official University Business

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.

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Action by:

Action:

Traveler/Lead Traveler
(cont.)

8. **Takes** the following actions when applicable:
 - a. **Follows** any internal department or division procedures that require obtaining authorization prior to submitting a TA through TEM, and/or
 - b. **Submits** the *Blanket Travel Authorization* form (FRM-U5348.10E).
9. If anticipates the need to request a travel advance, **understands** that:
 - 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
 - b. Unpaid or unreconciled balances are subject to income tax, interest, and immediate collection by the University.

Traveler/Lead Traveler
or assigned data entry
personnel

10. When a travel authorization is needed, **accesses** TEM system by following [TEM guides](#).
11. **Fills** out TA request on-line and includes all anticipated expenses.
 - a. If assigned data entry personnel initiates TA, **selects** "Traveler Review" to forward TA to the Traveler/Lead Traveler.

Traveler/Lead Traveler

12. **Ensures** TA is complete and accurate.
13. **Submits** TA request to Travel Services for approval via TEM.

Travel Services

14. **Receives** electronic notice to review a TA request.
15. **Takes** one of the following actions:
 - a. **Approves** TA if it meets requirements and **goes to** Step 17,
 - b. **Returns** TA to Traveler/Lead Traveler for correction and **repeats** Steps 12 - 14, or

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Action by:

Action:

Travel Services (cont.)

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.

Supervisor(s)

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.

Budget Authority

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.

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Action by:

Action:

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|---------------------------------|---|
| Traveler/Lead Traveler | <p>22. Receives electronic notice the TA has been approved.</p> <p>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.</p> <p>24. Makes necessary travel arrangements including paying for expenses as allowed.</p> <p>25. Upon return from travel, follows procedures:</p> <ul style="list-style-type: none"> • PRO-U5348.10C <i>Reconciling and Reporting Travel Expenditures</i>, and • PRO-U5348.10D <i>Requesting, Reconciling, and Collecting Advances</i> (if applicable) |
| Supervisor and Budget Authority | <p>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.</p> |
| Proxy | <p>27. Follows department procedures for reviewing TA's approved on behalf of a supervisor and/or budget authority.</p> |