**PROCEDURE**

Effective: September 28, 2023  
Approved by: Director of Business Services  
Authority: POL-U5348.10 Traveling for Official University Business

Cancels:

<table>
<thead>
<tr>
<th>Document #</th>
<th>Document Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRO-U5348.10A</td>
<td>Requesting Travel Authorization for Employees or Group Travel - Procedures</td>
</tr>
</tbody>
</table>

See Also:

<table>
<thead>
<tr>
<th>Document #</th>
<th>Document Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRO-U5348.10B</td>
<td>Reporting and Reconciling Travel Expenses and Advances - Procedure</td>
</tr>
<tr>
<td>PRO-U5348.10C</td>
<td>Reporting and Reconciling Expenses Associated with Travel Changes or Cancellations – Procedure</td>
</tr>
<tr>
<td>FRM-U5348.10A</td>
<td>Traveler Profile and Acknowledgement Form for New Travelers</td>
</tr>
<tr>
<td>FRM-U5348.10B</td>
<td>Traveler Add Data Entry Delegates Form</td>
</tr>
<tr>
<td>FRM-U5348.10C</td>
<td>Traveler Update Supervisory Approver Form</td>
</tr>
<tr>
<td>FRM-U5348.10D</td>
<td>Travel Proxy Approver Set-Up Form</td>
</tr>
</tbody>
</table>

**PRO-U5348.10A REQUESTING TRAVEL AUTHORIZATION FOR EMPLOYEES**

**Action by: Traveler**

1. **Discusses** travel needs with supervisor to ensure trip will be authorized when submitted formally through University travel system.

2. **Reviews** travel related policies, standards, and procedures to understand responsibilities and allowable travel expenditures.

3. **Inquires** about internal department procedures for travel.
   a) **Ensures** they are set up in the University Travel System (UTS) and whether or not a “delegate” can be assigned to assist with both Travel Authorizations and Travel Reimbursements.

4. If anticipates needing a travel advance, **reviews** the policy and procedures for responsibilities around travel advances.
**Action by: Traveler (cont.)**

5. **Submits** a Travel Authorization (TA)/Request through the UTS in accordance with instructions found on the Travel Services [website](#) and includes all expenditures expected to be paid by the University.

   a) If a delegate is assigned to initiate the TA/Request, the traveler is responsible for reviewing all information in the TA/Request entered by the delegate to ensure missing information is added and corrections are made.

**Action by: Travel Services**

6. ** Receives ** notice to review TA/Request.

7. ** Takes ** one of the following actions:

   a) ** Approves ** the TA/Request if it meets requirements, or
   
   b) ** Returns ** the TA/Request to the Traveler to make any corrections, or
   
   c) ** Returns ** TA/Request to Traveler to cancel travel request.

**Action by: Supervisory Approver (or proxy)**

8. ** Receives ** notice via email to review TA/Request.

9. ** Takes ** one of the following actions:

   a) ** Approves ** TA/Request if it meets requirements, or
   
   b) ** Returns ** TA/Request to Traveler to make any corrections, or
   
   c) ** Returns ** TA/Request to Traveler to cancel travel request.

**Action by: Budget Approver (or proxy)**

10. ** Receives ** notice via email to review TA/Request.

11. ** Takes ** one of the following actions:

   a) ** Approves ** TA/Request if it meets requirements, or
   
   b) ** Returns ** TA/Request to Traveler to make any corrections, or
   
   c) ** Returns ** TA/Request to Traveler to cancel travel request.
Action by: Traveler

12. **Receives** notice via email that the TA/Request has been approved.

13. **Reviews** Travel Services [website](#) for important information on ethics, rule compliance, safety, and other related procedures.

14. **Makes** necessary travel arrangements following department protocol for making payments with University funds.

15. Upon return from traveling, **follows** the *Reporting and Reconciling Travel Expenses and Advances Procedure* ([PRO-U5348.10B](#))