

PROCEDURE

Effective: September 28,2023

Approved by: Director of Business Services

Authority: [POL-U5348.10](#) Traveling for Official University Business

Cancels:

Document #	Document Title:
PRO-U5348.10A	Requesting Travel Authorization for Employees or Group Travel - Procedures

See Also:

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

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](#))