Training & Organizational
Development
Human Resources
UNIVERSITY *of* FLORIDA

A Travel Authorization (TA) is required for all international travel. This guide is designed for individuals responsible for submitting his or her own travel transactions or travel transactions for others. To complete these tasks, you must have the **UF_EX_EMPLOYEE** security role. To learn more, consider taking PST930 Travel and Expense.

New!

International travel on UF business requires a travel authorization (TA) as well as an acknowledgment signed by the traveler prior to approval and commencement of travel. In accordance with state law, travelers must read and acknowledge applicable UF policies and regulations, and agree to abide by any applicable state, federal or international laws while traveling on UF business. The acknowledgement form must be attached to the TA request. Visit the Foreign Travel website for more information.

Required Steps for Foreign Travel

1. Complete acknowledgement form.
2. Submit TA with acknowledgement attached.
3. Register with the University of Florida International Center.

"An Administrative Memo issued by the Provost requires students, faculty and staff who are traveling abroad to register all UF business related international travel with the UF International Center. Please visit the University of Florida International Center website for information regarding foreign travel."

1. Login to **myUFL**
   - Open an internet browser
   - Navigate to my.ufl.edu
   - Click the Access myUFL button
   - Enter your GatorLink username and password
   - Click the Login button

2. Navigate to: **Nav Bar** > **Main Menu** > **My Self Service > Travel and Expense > Travel Authorizations**.

3. The options on the Travel Authorization page of the Employee T&E Center include:
   - **Create/Modify:** Create or modify a new Travel Authorization to submit for approval or save for later or to change an existing Travel Authorization
   - **Print:** Print a hard copy of a Travel Authorization
   - **View:** See the status of a Travel Authorization
   - **Delete:** Delete a Travel Authorization from the system that was never approved
   - **Cancel:** Cancel a Travel Authorization that has already been approved but never used and is holding funds

4. Click the **Create/Modify** link.
   - To create a Travel Authorization for yourself, skip to step 10
   - To create a Travel Authorization on behalf of someone else, complete steps 7-9

5. Enter the **Empl ID** of the traveler and select the Add button, or use the Lookup icon and enter the traveler's name.

6. Select the **Lookup icon** twice to pull up all the UFIDs/Names you are linked with.

7. Select the **traveler**.
   - If the traveler doesn't populate from the list, check with your Departmental Security Administrator to ensure that you have been linked to the travel and that you have been given proper security for the individuals in your area.
   - For a non-employee, you must first "Add a Non-Employee" to get the employee added to your list.

8. Click the **Add** button.
   - Travel Authorizations are estimates for trip expenses.

9. Select the **Business Purpose** from list.
   - Click drop-down menu and select reason for trip as the business purpose
   - If your choice is not listed, find one that comes closest

10. Complete the **Description** field.
    - Provide a general description of the travel in this field
    - This field will hold up to 30 characters
    - Will be used as a searchable identifier later
    - Be sure to enter a description that will be easily recognizable to you

11. Enter or select the **Default Location**.
    - The Default Location is the ultimate destination of the travel
    - This location will populate the Details page of Expense Types selected
    - Use the following methods to search for a destination:
       o Enter the first few letters of the city, and then click the **Search icon**. All cities that start with those letters will be shown.
       o Select the **city**.
    - It is now the Default Location
    - If your city is not listed, select the "closest" and call the Travel Office at 392-1241 to have the correct city added to the list.
    - **Note**: An acknowledgment form must be completed by UF travelers with an international destination.
    - This is critical, since locations must appear on the list correctly to submit an Expense Report after the travel.

12. Select or enter the **Date From:** and the **Date To:**
    - To select the date:
      o Click **calendar icon**
      o Make sure to select correct **month**
      o Must be today's date or a date in the future

13. In the **Reference Field**: Other related items can be noted:
    - Name of another traveler
    - A different Travel Authorization number
    - An Expense Report number
    - This is not a mandatory field and can be left blank

14. In the **Comment Field**, enter the Benefit to Grant/Project or Benefit to UF.
    - Enter a more detailed description of why the travel is necessary
    - If grant funded, be sure to relate directly to any grant language concerning travel
    - Do not use abbreviations

15. After the first expense line has been added from the **Quick Start** area, select **Default Accounting** and click **Go**.
    - You can review the Accounting Summary link to verify or modify the ChartFields.
    - Modification options include:
      o Change ChartFields as needed
      o Add rows to split cost of entire Travel Authorization
      o Modify or split the cost of the entire travel transaction
        ▪ Use the Add ChartField Line button to add an additional row
        ▪ Use the % field to identify the percentage for each funding source
        ▪ Enter the rest of the ChartFields

16. Click the **OK** button.

17. Select **Expense Types** from the drop-down list.

18. For each **Expense Type**, complete the appropriate fields.
    - Date – Enter the date the expense is to be incurred
    - Description- This is for more information regarding the expense type
    - Payment Type – For each expense, select the appropriate payment type:
      o Avis Company Travel
      o Compl Trvl-Non
      o PP/Direct Payment
      o Personal Funds
      o UF PCard
        ▪ Amount – Enter the estimated amount. For some expenses, the amount will populate after completing the details page
      o Currency – No changes can be made

- o Billing Type
  - ▪ The Billing Type depends on Payment Type:
    - • For "Personal Funds," the Billing Type is based on the ultimate destination of the trip. Select In-state, Out-of-state, or Foreign from the drop-down.
    - • For all Payment Types other than "Personal Funds" the Billing Type is "PC/PP Expense."

19. Click the **Detail** link, the arrow to the left of the date, for each Expense Type.
    - • The Date, Payment Type and Billing type will be populated with the information you entered and selected on the previous page. You can made changes if needed.
    - • For any Expense Type you click, the Accounting Detail link to modify the ChartFields to pay the expense type from a different funding source or to split it between two or more funding sources.

Each Expense Type has different requirement on the Details page. Here are a few notes:

Mileage
- • Map Mileage is the linear distance traveled to and from a destination
- • Vicinity Mileage is within the destination
  - o Enter the destination of where the trip was from and to in the Description field
  - o Enter the number of miles for this expense
    - ▪ For mileage values, refer to MapQuest, Google, or other mileage calculators
  - o Insert miles
    - ▪ Calculates dollar amount, but leaves you on this page to modify or add other information
    - ▪ Based on mileage rate at date of expense, amount is updated
- • Enter the Number of Passengers (Note: names of passengers can be entered in the description field)
  - o At least one passenger must be listed
  - o Only include passengers on official UF Business
- • Originating and Destination Locations
  - o These locations are populated based on the Default Location you entered on the General Information section of the Travel Authorization Entry page.
  - o You can enter the city or search using the Lookup button
    - ▪ For more information, review the "Default Locations" instruction guide
  - o Originating Location
    - ▪ Change this field to the city from which the travel will originate
  - o Destination Location
    - ▪ Enter the ultimate destination of the travel
  - o Because format counts, it is best to select locations using the search function
- • Description
  - o Enter the names of the additional passengers
  - o If no other passengers, type "N/A" or "No Additional Passengers.

Airfare
- In the Description field, enter the allowable airfare code letter.
- Enter Payment type
- Enter Amount
- Enter Billing Type
- Originating Location: Where the plane leaves the ground
- Travel To: Select the city to which you are traveling
- Enter the Ticket Number
  - If the ticket has not been purchased when you are creating this transaction, enter "Pending"
- Currently there is not a preferred merchant for airlines. Select non-preferred.
- Enter the name of the airline.

Lodging
- In the Description field, state single room rate unless someone else is staying in the same room. If someone else is staying in the room, provide their name and information.
- Enter Payment Type
- Enter Amount (Note: This will auto-populate after other information has been entered)
- Enter Billing Type
- Location: City lodging is in
- Enter the Number of Nights: This number will be used to calculate the total amount for lodging
- Enter Nightly Rate: Note the system will calculate the total lodging amount and auto populate in the Amount field
  - Currently there is not a preferred merchant for Lodging, select Non-Preferred
  - Enter the Merchant

20. After completing the detail for each Expense Type, select **Save for Later**.
21. Select the **Review for errors** button.
    - Errors will be noted by a red flag next to the expense or by a red box that requires attention
    - Click the red flag for the details of the error
    - Make corrections as needed
22. Select **Save for later** and review for accuracy.
23. To submit, check the box that states: "By checking this box, I certify these costs are reasonable estimates and comply with expense policy."
24. Select the **Submit Travel Authorization** box.
25. At the confirmation page, click **OK** to submit or **Cancel** to make changes.

To keep this Instruction Guide brief, Map Mileage, Airfare, and Lodging are the only Expense Types covered. For information on other Expense Types, it is recommended that you complete the PST930: Travel and Expense training class. If you have immediate needs that are not met by this Instruction Guide or the Travel Handbook, please contact the Travel Office at 392-1241.

If you need help with…
- Technical issues, contact the UF Help Desk at 392-HELP helpdesk@ufl.edu
- Policies and Directives, contact the Travel Office at 392-1241