GUEST TRAVEL PROCESS

The Guest process at the University of Florida (UF) is composed of two steps. This is an overview for those using the **POI Type 00016 Travel-Related** for Guest Travel and General Reimbursement. Guest do not have access to the UF GO system. For **POI 00017** and **00018**, review the **UF GO Associate/Emeritus Process** guide.
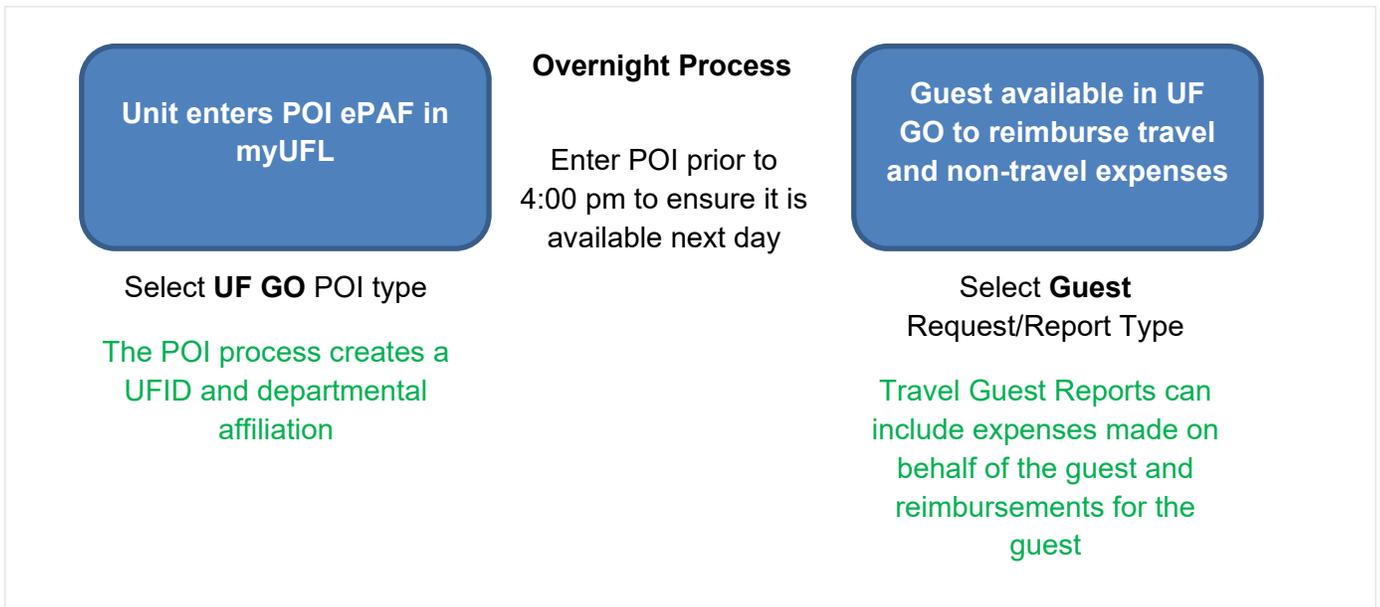
1. Create a POI in myUFL
2. Enter a Guest Request/Expense Report in UF GO

DEFINITIONS

- **Guests:** In the UF GO system, guests are defined as individuals who are not UF employees and need to be reimbursed for travel or non-travel expenses
  - For example, job candidates, speakers, consultants, and non-employed students (graduate and undergraduate)
- **Person of Interest (POI) ePAF:** An HR electronic form that creates a record for a non-employee in the myUFL system
  - For UF GO, this ePAF create a UFID, departmental affiliation, and the connection to the UF GO system so an individual can get reimbursed

GUESTS IN UF GO

- To reimburse a non-employee for travel or non-travel expenses, this individual has to be added in the myUFL system through the POI process
- The POI process connects a non-employee in myUFL to the UF GO system
- Once the POI is in myUFL, an overnight file will transfer that information to UF GO and a Guest Request and/or Report can be created for this individual

Unit enters POI ePAF in myUFL

Overnight Process

Enter POI prior to 4:00 pm to ensure it is available next day

Guest available in UF GO to reimburse travel and non-travel expenses

Select **UF GO** POI type

The POI process creates a UFID and departmental affiliation

Select **Guest** Request/Report Type

Travel Guest Reports can include expenses made on behalf of the guest and reimbursements for the guest

1. CREATE A POI EPAF IN MYUFL

Security Role: **UF_EPAF_POI_Coordinator** will grant access to complete the POI process and it is restricted to the POI ePAF.

Training: To obtain the **UF_EPAF_POI_Coordinator** role, you will need to complete the following two courses:

- UF_PRV802_OLT   FERPA Basics
- UF_PRV804_OLT   Protecting Social Security Numbers & Identity Theft Prevention

TIP! HR professionals who have the UF_EPAF_DepartmentAdmin or the UF_EPAF_Level 1 Approver role (can enter hires, terminations, etc.) are able to complete this step without additional training.

UF GO POI TYPES

UF GO has different POI types that provide a distinct experience. It is essential that the correct POI type is selected when entering them in the system in order to obtain the desired end-result.

POI Type	When to use it?	User Experience
00016 – Travel Related	Use for travel or non-travel reimbursement for job candidates, speakers, consultants, and non-employed students (graduate and undergraduate)	No access to the UF GO system
00017 – UF GO Associate	Use for non-UF employees who need full access to the UF GO system. For example: TempForce workers, Shands employees who assist UF employees, County Extension, etc.	Can access the UF GO system like a UF profiled user
00018 – Emeritus User	Use for faculty who have received Emeritus status and will continue to be active travelers or PCardholders	Can access the UF GO system like a UF profiled user

STEPS

1. In the UF GO system, verify the Guest is not already available as an active Guest Payee
2. Log in to my.ufl.edu
3. Navigate to ePAF Home Page:
    - NavBar > Main Menu > Human Resources > UF Departmental Administration > ePAF Home Page
4. Follow the process delineated on the **Creating a Person of Interest** instruction guide
   Key Information:
    - Social security is **NOT** a required field for a POI
    - If an individual has an existing UFID, enter it on the UFID field and click **Search**
        - For active students or past affiliates, information will pull from Identity hub
    - Guests will be paid via check, unless ACH information is entered as part of the POI process
    - Existing non-employees may receive a request to complete the Gatorlink creation process, this is not required for UF GO and should be disregarded
        - This will only occur if the individual has an active UF affiliation

2. ENTER A GUEST TRAVEL REQUEST/EXPENSE REPORT IN UF GO

The intent of this section is to highlight the key differences between Travel Requests and Expense Reports for a UF GO profiled user and a guest. Once the Guest Traveler has been entered in myUFL, the UFID and name will be available to create a Travel Request, Travel Expense Report, and/or General Reimbursement.
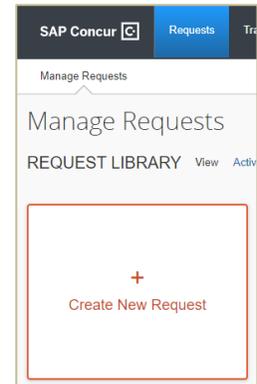
The Guest will not have access to the UF GO system, and the Request or Expense Report must be created by a UF GO Profiled User.

TRAVEL REQUEST

NAVIGATION

Access UF GO via **ONE.UF** and **myUFL**

- **ONE.UF**: Log in to https://one.ufl.edu > Select **UF GO** under the Faculty/Staff section
- **myUFL**: my.ufl.edu > My Self Service > **UF GO Travel and PCard**

LOGGING IN

1. Enter gatorlink@ufl.edu and click **Next**
2. Click **Sign in with University of Florida SSO**
3. Enter **UF gatorlink** and **password**

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

STEPS

1. Click **Request** > Click **Create New Request**

2. Select one of the available **Guest Request** types
   - UFLOR Domestic Travel Request (Guest)
   - UFLOR International Travel Request (Guest)

3. Enter the **UFID** or **Name** of the **Guest Traveler** field
   - Verify that the filter next to the field is set to **Either**

4. Complete the remaining of the Travel Requests fields using the Create and Submit Travel Requests instruction guide.
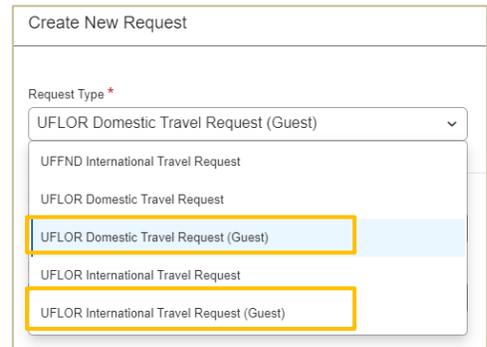
CREATE A GUEST EXPENSE REPORT

There are two types of expense reports that may be entered for a Guest:

- UFLOR Travel Report (Guest)
- UFLOR General Reimbursement – Guest (Non-Travel)

STEPS

1. Click **Expense** > Click **Create New Report**

2. Select one of the available **Guest Report** types

3. Enter the **UFID** or **Name** of the **Guest Payee** field
   - Verify that the filter next to the field is set to **Either**
   - Selecting a payee ensures any reimbursement, whether travel or non-travel related is sent to the appropriate person

4. Complete the remaining of the Expense Reports fields (travel or non-travel) using the appropriate instruction guide
   - Create and Submit a Travel Expense Report
     - A **Travel Report (Guest)** can include the reimbursement for the Guest traveler and the expenses paid by a UF GO Profiled User's PCard
   - Create and Submit a Report for General Reimbursement
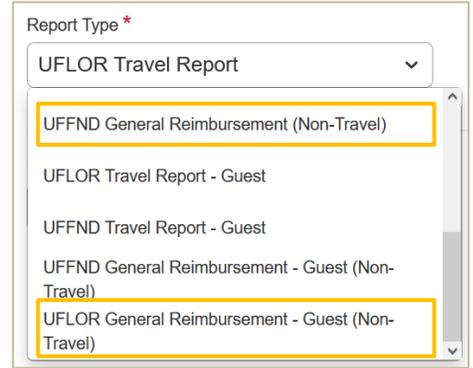
BOOKING A TRIP FOR A GUEST

The Travel module of UF GO allows for booking on behalf of guests.

STEPS

1. Click **Travel** > Click **Book for a guest**
2. Enter the trip information
   - You can book airfare, car rental, hotel, and rail
   - You will be able to enter the guest's information at the end of the reservation
3. For assistance in completing a booking, please refer to the Booking Travel in UF GO instruction guide.
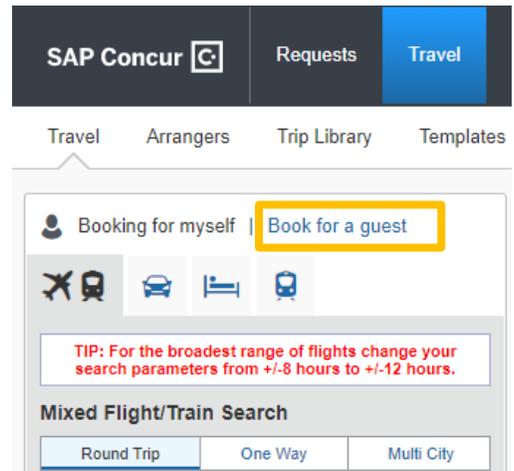
FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives
Travel Office
352-392-1241
travel@ufl.edu

PCard Policies & Questions
PCard Team
352-392-1331
pcard@ufl.edu