



FIU

FLORIDA INTERNATIONAL UNIVERSITY
Miami's public research university

Travel Authorization Request TAR01

PeopleSoft 8.4



Fall 2007

Travel Authorization Request Table of Contents

Overview	3
Objectives	3
Important Notes	4
Chapter 1 – Creating a Travel Authorization Request.....	4
Chapter 2 – Printing the TAR.....	22
Chapter 3 – Canceling\Deleting a TAR	28
Appendix A	28
Appendix B	
Appendix C	30

Overview

This course describes and illustrates how to create and process a Travel Authorization Report using the PeopleSoft system.

Shortly after this course, you will begin using the PeopleSoft system to create your own TARs. This document is meant to guide you through this new process.

Objectives

By the end of this course, you will be able to:

- Understand how to create a Travel Authorization Request using the Peoplesoft system.

Note: For additional information on the Travel Policies and Procedures please visit the following websites:

Travel Policy: http://policies.fiu.edu/record_profile.php?id=548

Travel Procedures: <http://www.fiu.edu/orgs/controller/travel1.htm>

Important Notes

Florida Statute requires that all travel must be authorized and approved by the head of the agency, or his or her designated representative, from whose funds the traveler is paid. The head of the agency shall not authorize or approve such a request unless it is accompanied by a signed statement by the traveler's supervisor stating that such travel is on the official business of the state and also stating the purpose of such travel. The Travel Authorization Request (TAR) meets this requirement. Only the estimated cost amounts that are reimbursable to the traveler will be encumbered via the PeopleSoft Online TARs. All other travel expenditures, such as those to be paid by the traveler's ProCard, paid directly by Accounts Payable through a university invoice, or directly through our travel agency (Traveleaders), are immediately expensed when those transactions take place and are **not** encumbered via the TAR. These expenditures typically occur prior to the travel voucher being processed which further supports not encumbering these funds. The TAR serves as an official document for the approval of total travel expenditures but not to encumber all travel related expenditures as explained above.

In some instances, Athletics and SGA, team travel is authorized and so a TAR is set up in the name of a team leader or a coach. Any registration fees, entry fees, advances, or Procard purchases for the entire group are then placed on this individual's TAR. This also includes Study Abroad programs and Debate Teams. (This individual is responsible for the entire group)

If the individual preparing the TAR is not the traveler (referred to as the initiator) then the traveler must approve the TAR as documented by his/her signature on the printed TAR.

Forms for Expense Reimbursements, and Travel Laws are located at the Controller's Office web site which is listed below.

<http://www.fiu.edu/orgs/controller/travel1.htm>

Topics found at the above link:

- Foreign Per Diem
- Travel Law
- Mileage Guidelines

Chapter 1 – Creating a Travel Authorization Request

Definition

The Travel Authorization Request (TAR) is the state's formal document to secure approval to incur travel expenses. This form must be submitted for all travel performed by individuals traveling on official business of the University. The TAR must be printed and signed by the traveler, the traveler's supervisor, as well as by the department head/Project PI of the funding department/project. In most instances, the supervisor and the funding department/project approver are the same person.

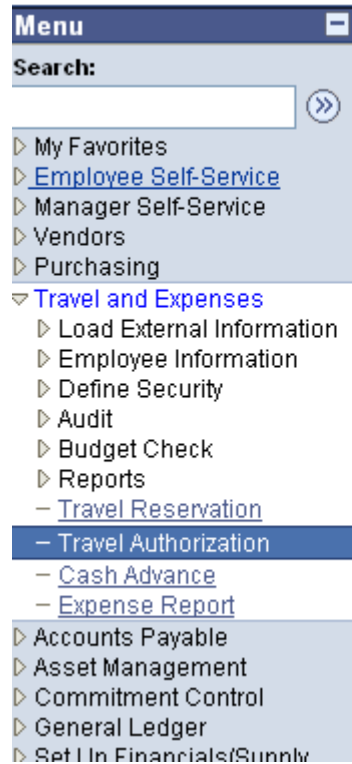
After saving the TAR, the system will automatically assign you a TAR number. Once the TAR is printed and all required signatures have been obtained, it should be faxed to the Travel department in the Controller's office at 7-6998.

Prior to preparing TAR, the following information is needed:

- Name of traveler and Panther ID (EmplID or Employee ID)
- Length of trip (To and From dates of travel)
- Estimated expenses
- Funding Source(s)

Navigation:

- Travel and Expenses
- Travel Authorization



Travel and Expense

Travel Authorization



Add

Create/Update a Travel Authorization and submit it for approval or save for further work.




Modify







Change an existing Travel Authorization and submit it for approval or save for further work.

- After clicking **Travel Authorization** link the following menus will appear.

Travel and Expense

Travel Authorization



					
Add	Modify	View	Delete	Cancel	Print
Create/Update a Travel Authorization and submit it for approval or save for further work.	Change an existing Travel Authorization and submit it for approval or save for further work.	Check the status of an existing Travel Authorization request.	Remove a Travel Authorization from the expense system.	Cancel an Approved Travel Authorization.	Print a hardcopy of a Travel Authorization.

- Click the **“Add”** link to begin creating your TAR.
- The following screen contains two tabs:
 1. **“Find an Existing Value”** tab will to search for an existing TAR.
 2. **“Add a New Value”** tab will allow you to create a TAR for Traveler

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#) ←

Search by: begins with

| [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- To create a new TAR “click” on the “**Add a New Value**” tab. You must enter Traveler’s ID (Panther ID) in the “**EmpID**” field to proceed.

Travel Authorization

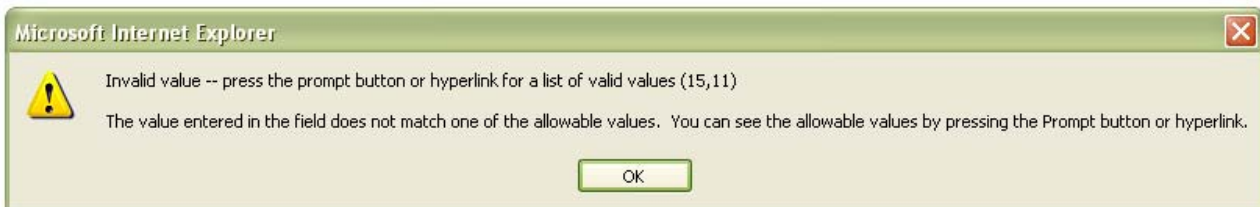
[Find an Existing Value](#) | [Add a New Value](#)

EmpID:

←

[Find an Existing Value](#) | [Add a New Value](#)


- If the following message should appear on your screen, then the Traveler is not eligible to travel.



- In order to be eligible to travel, the following two points will allow you to proceed in entering a TAR for Traveler:

1. If the traveler is a non employee, the “Non-Employee Information Form” should be faxed to the Controller’s office at (7-1909) so that the traveler can be set up in the system. Forms are located at <http://www.fiu.edu/orgs/controller.>) Non-employees are typically candidates, visitors, etc. **See Appendix C**
 2. If the traveler a new employee, then the **Traveler’s** department must contact HR to be set up in the system.
- Once the Traveler has been setup for travel then the screen below will appear when you click the “**Add**” button.

Request a Travel Authorization



Choose a Creation Method

Joaquin Bello Travel Auth ID: NEXT

Open a Blank Travel Auth

Copy From Existing Travel Auth

Use a Template

←

Choose a method to create a new travel authorization. Your selection triggers other choices that prompt you for details about the authorization.

- Select the **Open a Blank Travel Auth** (open a blank travel authorization) option to create a new travel authorization with minimal pre-populated data. The system displays the Travel Authorization - General Information page.
- Select the **Copy From an Existing Travel Auth** (copy from an existing travel authorization) option on the Request a Travel Authorization. Select an existing travel authorization on which to base a new authorization. This option will be selected when the travel is recurring (quarterly meeting) and the information remains constant.
- Select the **Use a Template** option on the Request a Travel Authorization - Choose a Creation Method page. (There are no Templates currently defined for FIU)

Once you have chosen your “**creation method**”, click on the “**Continue**” button.

- **Description-** Enter detailed description (i.e. Trip to Orlando 12/04/2007)
- **Date From\To** - Enter travel dates

Request a Travel Authorization

General Information

Juan Covas li Empl ID: 1141155 **Travel Auth ID:** NEXT

*Description:
(Example: Trip to New York)

*Date From: *To:

*Business Purpose:

Originating Location:

Travel To:

*Benefit To State/Project:

Go To: [Default Accounting For This Travel Authorization](#)

* Required Field

- **Business Purpose-** Select from a predefined list (using the drop down menu), defined by the Travel Department. *State Statutes and Federal Tax laws require a business purpose for business expenses, so this field is mandatory.*
- **Originating Location-** Please enter the state or country and city from which the trip will originate.
- **Travel To-** Enter the destination for the Traveler.
 - When entering the state or country and city in both fields, the options available when clicking the may not have the exact location you need.

- Please choose a city that is closest to the location in which the Traveler is originating and traveling to, or select the option “Other” (if listed).

Look Up Travel To

Search by: Expense Location ▼ begins with

Look Up
Cancel
[Advanced Lookup](#)

Search Results

View All First ◀ 1-17 of 17 ▶ Last

Description
Florida, Apalachicola
Florida, Cocoa Beach
Florida, Daytona Beach
Florida, Fort Lauderdale
Florida, Fort Myers
Florida, Gainesville
Florida, Jacksonville
Florida, Key West
Florida, Melbourne
Florida, Miami
Florida, Orlando
Florida, Panama City
Florida, Pensacola
Florida, Tallahassee
Florida, Tampa - St. Petersburg
Florida, Vero Beach
Florida, West Palm Beach

The screen above shows an example of the options you may have when clicking the button.

- **Default Accounting For This Travel Authorization** - Click to view or change the distribution or ChartFields for travel authorization expenses. The system displays the Travel Authorization - Default Accounting page. On this page you can split expenses by percentages into different departments and/or projects. The percentages defined here will default to all the expense lines in the TAR report. The default accounting is established when the traveler is created in the system based on the forms submitted. Typically it will be the employee’s home department.

Request a Travel Authorization

Default Accounting For This Travel Authorization

Juan Covas li **Empl ID:** 1141155 **Travel Auth ID:** NEXT

Accounting Summary [Set Personalizations](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

GL ChartFields 1 GL ChartFields 2

%	GL Unit	Fund	DeptID	Program
100.00	FIU01	335	240500602	78

Continue - Click to add expense type lines on the Travel Authorization Summary page

Request a Travel Authorization

Travel Authorization Summary

Juan Covas li **Empl ID:** 1141155 **Travel Auth ID:** NEXT

General Information

Description: Trip to Orlando
Travel Date From: 12/04/2007 **To:** 12/07/2007
Business Purpose: Seminar

Add Expense

Expense Type:

Merchant **Amount** **Currency**

	0.00	USD
--	------	-----

Total Expenses: 0.00 USD

Go To: [Modify Report Information](#)
[Create A Cash Advance](#)

* Required Field **Image Now**

Expense Type (For specific information to each expense type, please refer to Appendix A)

As you enter each expense, it appears as a line item expense type. The expense amount appears in US Dollars.

To modify an expense line, click the expense type to open the Travel Authorization - Expense Item page.

Travel Authorization Status

This section tells you where the travel authorization is in the system.

Save Detail

Save for Later

Save the expense authorization document without submitting it for approval. The system assigns a Travel Authorization ID. The page refreshes and displays the Travel Authorization Status and Approval Detail sections.

Modify Report Information

Select to return to the Travel Authorization - General Information page.

- Select an Expense Type from the options available and press ADD

Request a Travel Authorization



Add Expense - Hotel \ Lodging

Juan Covas li

Empl ID: 1141155

Travel Auth ID: NEXT

Please fill in the following fields for this expense transaction. You can then add additional expense items, if desired, at the bottom of this page or return to the main page by pressing 'Done'.

Expense Information

*Date:

Payment Type:

*Billing Type:

Number of Nights:

Amount: USD

Current Expenses

Date	Expense Type	Amount
12/04/07	Hotel \Lodging	0.00
Travel Auth Total:		0.00

Add Another Expense

Expense Type:

[Copy Current Expense](#)

Go To: [Accounting For This Expense](#)
[Maximum Per Diem Rates Table](#)
[Meals & Incidental Expense Rate Table](#)

* Required Field

Request a Travel Authorization



Add Expense - Carrier

Juan Covas

Empl ID: 1141155

Travel Auth ID: NEXT

Please fill in the following fields for this expense transaction. You can then add additional expense items, if desired, at the bottom of this page or return to the main page by pressing 'Done'.

Expense Information

*Date:

Payment Type:

*Billing Type:

Ticket Number:

Merchant:

Preferred

Non-preferred

Amount: USD

Current Expenses

Date	Expense Type	Amount
12/04/07	Hotel \ Lodging	600.00
12/04/07		150.00
Travel Auth Total:		750.00

Add Another Expense

Expense Type:

[Copy Current Expense](#)

- Go To:
- [Accounting For This Expense](#)
 - [Location Amount Exceed Comment](#)
 - [Non-Preferred Merchant Comment](#)
 - [Maximum Foreign Travel Per Diem Rates Table](#)
 - [Breakdown of Foreign Meals & Incidentals Table](#)

* Required Field

COMMON EXPENSE INFORMATION for all Billing Types:

Billing type: Use dropdown menu to select Billing Type.

1. **Travel Foreign** –Reimbursable item to traveler going outside the U.S. Traveler will pay for this item with his\her own funds (*Payment Type will default as Pay to Traveler*)
 2. **Travel In State** -Reimbursable item to traveler within the state of Florida. Traveler will pay for this item with his\her own funds. (*Payment Type will default as Pay to Traveler*)
 3. **Travel Out of State** - Reimbursable item to traveler outside the State of Florida. Traveler will pay for this item with his\her own funds. (*Payment Type will default as Pay to Traveler*)
 4. **University Paid - Direct Bill**- any item paid to outside vendor not on Procard and not paid by traveler. This is for an item paid via accounts payable or directly by FIU. (I.e. Avis, Enterprise, Registration, etc.) (*Payment Type will default as University Paid*)
 5. **University Paid - Procard**- Any expense paid using the traveler's FIU-issued Visa Procard. (*Payment Type will default as University Paid*)
 6. **University Paid - Traveleaders** - typically Airline ticket paid through FIU Travel agency on FIU Corporate Account (*Payment Type will default as University Paid*)
-
- **Accounting For This Expense**- Click to view or change the department/project distribution for expense line. The system displays the Travel Authorization - Accounting Detail page. This page displays the accounting distribution for the particular line item. The accounting distribution previously entered on the 'Default Accounting for This Expense' will be displayed here. This is where you could change the accounting distribution, if needed.

Request a Travel Authorization



Accounting Detail

Juan Covas

Empl ID: 1141155

Travel Auth ID: NEXT

This is the accounting detail for expense type Carrier with a transaction date of 2007-12-04 in the amount of 150 USD. If changes are made inadvertently, you may reset the default accounting values by hitting the 'Restore Defaults' button.

[Restore Defaults](#)[Set Personalizations](#) | [Find](#) | [First](#) 1 of 1 [Last](#)[GL ChartFields 1](#)[GL ChartFields 2](#)

Amount	'GL Unit	Account	Alt Acct	Fund	DeptID
150.00	FIU01	711213	71100	335	240500602

[Add](#)[Recalculate the Amounts](#)[Previous Expense](#)[Next Expense](#)[OK](#)[Notify](#)

Once you finish adding the expenses click Done

Request a Travel Authorization



Add Expense - Carrier

Juan Covas

Empl ID: 1141155

Travel Auth ID: NEXT

Please fill in the following fields for this expense transaction. You can then add additional expense items, if desired, at the bottom of this page or return to the main page by pressing 'Done'.

Expense Information

Date:

Payment Type:

Billing Type:

Ticket Number:

Merchant:

Preferred

Non-preferred

Amount: USD

Current Expenses

Date	Expense Type	Amount
12/04/07	Hotel \ Lodging	600.00
12/04/07	Carrier	150.00
Travel Auth Total:		750.00

Add Another Expense

Expense Type: [Copy Current Expense](#)

Go To: [Accounting For This Expense](#)
[Maximum Foreign Travel Per Diem Rates Table](#)
[Breakdown of Foreign Meals & Incidentals Table](#)

* Required Field

Request a Travel Authorization



Travel Authorization Summary

Juan Covas

Empl ID: 1141155

Travel Auth ID: NEXT

General Information

Description: Trip to Orlando
Travel Date From: 12/04/2007 **To:** 12/07/2007
Business Purpose: Seminar

Add Expense

Expense Type:

Expense Type	Merchant	Amount	Currency
Hotel \ Lodging		600.00	USD
Carrier		150.00	USD

Total Expenses: 750.00 USD

Total Encumbrance Amount: 600.00 USD

 Image Now

 Go To: [Modify Report Information](#)
Budget Status N

* Required Field

- The screen above shows the summary of the TAR. At this point the following steps can be taken:
 1. **“Save For Later”** (This tab will allow you to save your TAR)

Request a Travel Authorization



Save Confirmation

Juan Covas

Empl ID: 1141155

Travel Auth ID: NEXT



The Save was successful.

Please print the travel authorization request, obtain necessary signatures on document and fax to travel department at(305)348-6998. Your travel is not approved until received by the travel department, signatures have been verified and budget check is completed. Travel Authorization not faxed in a timely manner will be subject to cancellation.



- The screen above will inform you that the TAR was saved successfully after you saved it for a later.
- Click **“OK”** to proceed.

The TAR number will be assigned automatically on the upper right hand corner.

Request a Travel Authorization



Travel Authorization Summary

Juan Covas

Empl ID: 1141155

Travel Auth ID: 0000022147

General Information

Description: Trip to Orlando
Travel Date From: 12/04/2007 **To:** 12/07/2007
Business Purpose: Seminar

Add Expense

Expense Type:

<u>Expense Type</u>	<u>Merchant</u>	<u>Amount</u>	<u>Currency</u>	
Hotel \ Lodging		600.00	USD	<input type="button" value="-"/>
Carrier		150.00	USD	<input type="button" value="-"/>
Total Expenses:		750.00	USD	
Total Encumbrance Amount:		600.00	USD	

Travel Authorization Status

<u>Routing</u>	<u>Name</u>	<u>Approval Status</u>	<u>Date</u>
Originator	Quinones, Daniel A	In Process	11/15/2007

Approval Detail

[Find](#) | [View All](#) First 1 of 1 Last

Name:

Comment:

 Image Now

Go To: [Modify Report Information](#)

Budget Status N







* Required Field

If you need to make any additional changes to the TAR prior to it being faxed to the Controller's Office you can accomplish this by using **"Modify"** in the main menu.

Please Note: Once you have faxed the TAR to the Controller's Office it can no longer be modified. Any changes can be made on the Expense Report (travel voucher) to be submitted after the completion of travel.

Travel and Expense


Travel Authorization

					
Add Create/Update a Travel Authorization and submit it for approval or save for further work.	Modify Change an existing Travel Authorization and submit it for approval or save for further work.	View Check the status of an existing Travel Authorization request.	Delete Remove a Travel Authorization from the expense system.	Cancel Cancel an Approved Travel Authorization.	Print Print a hardcopy of a Travel Authorization.

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by:  begins with

[Advanced Search](#)

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

[Add a New Value](#)

Search by: begins with

[Search](#)

[Advanced Search](#)

Search Results

[View All](#)

First 1-11 of 11 Last

Travel Authorization ID	Travel Auth Description Name	EmpID	Travel Authorization Status	Creation Date
0000015688	Trip to Orlando	Covas li,Juan A 1141155	Pending	10/04/2007
0000015687	Trip to Chicago	Covas li,Juan A 1141155	Pending	10/03/2007
0000015686	asdsa	Covas li,Juan A 1141155	Pending	10/03/2007
0000015685	asdasdas	Covas li,Juan A 1141155	Pending	10/03/2007
0000015684	asdasdas	Covas li,Juan A 1141155	Pending	10/03/2007
0000015683	Test	Raya,Emilio Jose 1285756	Pending	09/28/2007
0000015682	f	Raya,Emilio Jose 1285756	Pending	09/27/2007
0000015681	lhl	Covas li,Juan A 1141155	Pending	09/25/2007
0000015678	kj;kljkl	Raya,Emilio Jose 1285756	Pending	09/25/2007
0000015677	Test	Raya,Emilio Jose 1285756	Pending	06/27/2007
0000015674	t	Raya,Emilio Jose 1285756	Pending	04/19/2007


[Find an Existing Value](#) | [Add a New Value](#)

Once you find your TAR number you can edit the report.


Chapter 2 – Printing the TAR

Travel and Expense


Travel Authorization




[Add](#)
Create/Update a Travel Authorization and submit it for approval or save for further work.




[Modify](#)
Change an existing Travel Authorization and submit it for approval or save for further work.




[View](#)
Check the status of an existing Travel Authorization request.



[Delete](#)
Remove a Travel Authorization from the expense system.



[Cancel](#)
Cancel an Approved Travel Authorization.



[Print](#)
Print a hardcopy of a Travel Authorization.

- Click on the print link on the main menu.

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Select the Add a new value tab in order to create a new Run control ID. This ID can be any name for you to run other TAR's (Example: TAR_Print).

Travel Authorization

[Find an Existing Value](#) | [Add a New Value](#)

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

Travel Authorization

Run Control ID: TAR_Print [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Parameters

Travel Auth ID:

- You can now search your TAR ID by typing the number in the Travel Auth ID box or by using the magnifying glass.

Look Up Travel Auth ID

Travel Authorization ID:

Travel Auth Description:

Name:

EmpID:

Travel Authorization Status:

Creation Date:

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.
[View All](#) First 1-100 of 300 [Last](#)

Travel Authorization ID	Travel Auth Description	Name	EmpID	Travel Authorization Status	Creation Date
0000015688	Trip to Orlando	Covas Ii,Juan A	1141155	Pending	10/04/2007
0000015687	Trip to Chicago	Covas Ii,Juan A	1141155	Pending	10/03/2007
0000015686	asdsa	Covas Ii,Juan A	1141155	Pending	10/03/2007
0000015685	asdasdas	Covas Ii,Juan A	1141155	Pending	10/03/2007
0000015684	asdasdas	Covas Ii,Juan A	1141155	Pending	10/03/2007
0000015683	Test	Raya,Emilio Jose	1285756	Pending	09/28/2007
0000015682	f	Raya,Emilio Jose	1285756	Pending	09/27/2007
0000015681	lhl	Covas Ii,Juan A	1141155	Pending	09/25/2007
0000015680	khikhikhikhikhik	Kapras,Mark M	1077770	Approved	09/25/2007
0000015678	ki.kljk	Raya,Emilio Jose	1285756	Pending	09/25/2007
0000015677	Test	Raya,Emilio Jose	1285756	Pending	06/27/2007

Travel Authorization

Run Control ID: TAR_PRINT [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters

Travel Auth ID:

Save **Return to Search** **Notify** **Add** **Update/Display**

Once you select your TAR you can save the Control ID in order for you to use it again in the future when for printing another TAR. To print the selected TAR click on **Run**

Process Scheduler Request

User ID: 1396783 Run Control ID: TAR_PRINT

Server Name: **Run Date:**

Recurrence: **Run Time:** **Reset to Current Date/Time**

Time Zone:

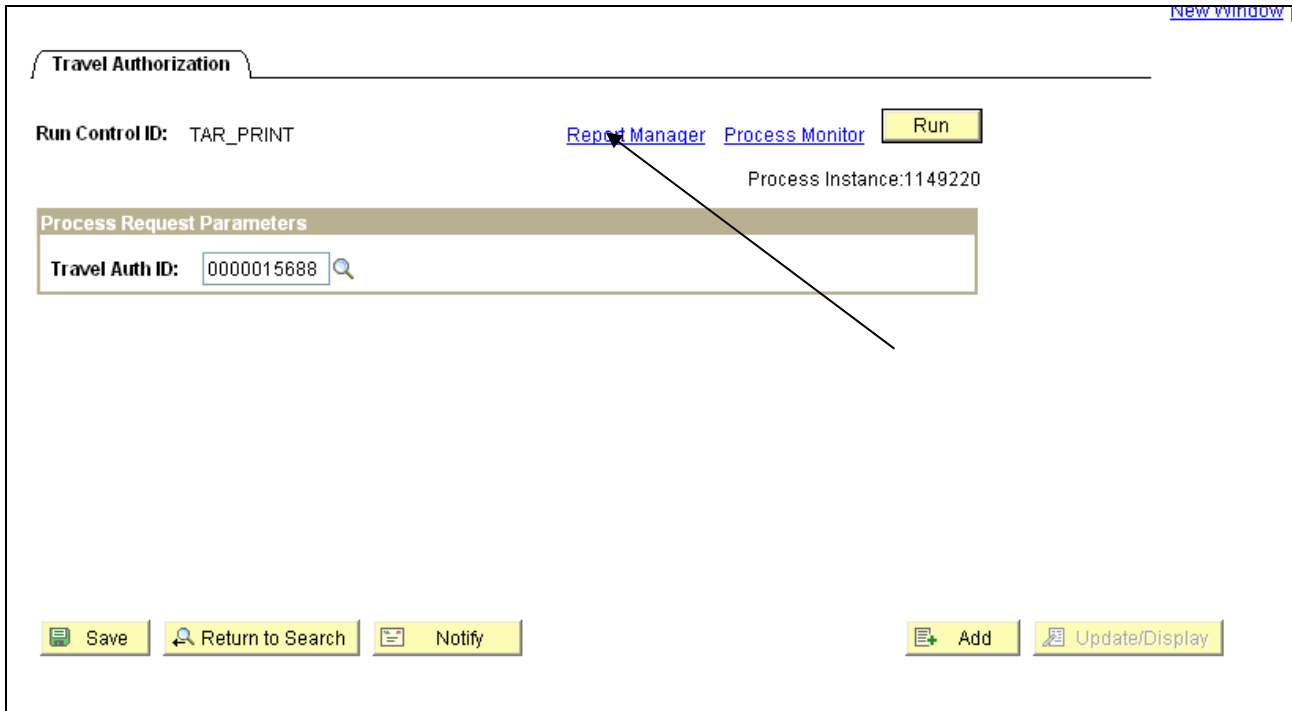
Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Travel Authorization	EXC8500-	Crystal	Web	PDF	Distribution

OK **Cancel**

Select PSNT in the server name field and click **OK**
You have now initiated the process to run the report and it will be available in the Report Manager.

Click the Report Manager link to retrieve the report



[NEW WINDOW](#)

Travel Authorization

Run Control ID: TAR_PRINT [Report Manager](#) [Process Monitor](#)

Process Instance:1149220

Process Request Parameters

Travel Auth ID:

Click on the Administration tab to locate the report you have just created

[List](#) | [Explorer](#) | **Administration** | [Archives](#)

View Reports For

User ID: Type: Last: Days Refresh

Status: Folder: Instance: to:

Report List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1190613	1149164	Travel Authorization	10/03/2007 4:41:38PM	Acrobat (*.pdf)	Posted	Details

[Select All](#) [Deselect All](#)

Click the delete button to delete the selected report(s)

[List](#) | [Explorer](#) | [Administration](#) | [Archives](#)

Click on the link in the description column for the report you would like to view. The most recent report that you create will be at the top

Note: You may need to hit Refresh button, until the report status is posted.



Travel Authorization

PeopleSoft Expenses 8.0 - EX06500

Employee ID / Name 1141155 Covas II, Juan A	Travel Authorization ID 0000015714	Travel To: Florida, Orlando	Travel Date: From/To 12/4/2007 / 12/7/2007	Business Purpose Seminar
---	--	---------------------------------------	--	------------------------------------



Expense Lines:

Date	Expense Type	Account	Billing Type	Location	Department ID / Project ID	Amount
12/4/2007	AIR	NONENC	University Paid - Traveler	Florida, Orlando	240500602	150.00
12/4/2007	LODGING	711211	Travel in State	Florida, Orlando	240500602	600.00

Benefit to State / Project:

Only amounts to be reimbursed to traveler are encumbered

required

	Total
Encumbered Amount	600.00
Paid directly by University	150.00
Total Estimated cost for TAR	750.00

Authorizations:

Supervisor Signature _____ Partner ID _____ Date _____

Employee Signature _____ Date _____

Pursuant to Florida Statutes Section 112.061 (3) (b), I hereby certify or affirm that this travel is an official business of the State of Florida and will be performed for the purpose(s) stated. If Project related, this travel is necessary for the success and completion of the project. If foreign travel and if the traveler declines to purchase insurance, the traveler is certifying that the traveler is aware that the traveler health insurance may not cover the medical expenses or emergencies in the foreign country.

Approvals:

Department/ Project ID
240500602

Approved by: _____ Date: _____
Partner ID: _____

Pursuant to Florida Statutes Section 112.061 (3) (b), I hereby certify or affirm that approval is granted for travel under the department or project ID listed on the purpose and benefit noted. I am the designated representative for the department or project ID shown above.

If Foreign Travel, has foreign travel insurance been purchased through Environmental Health & Safety for the traveler? Yes No N/A

In case of travel emergencies, who in your department may we contact? Name: _____ Ext: _____

If a Federal Project, a US carrier must be used for all air travel. Note that for items being paid by the University, please follow the appropriate purchasing process to procure these items. If a cash advance is requested, please complete the cash advance form and submit to the Travel department. The traveler is responsible for any university paid travel expenses not substantiated by a travel voucher or are not in compliance with the University Travel Expense policy.

Employee Phone 305/752-5195	Entered By 1396783	Created By Daniel Antonio Quinones	Create Date 10/24/2007	Print Date 11/01/2007	Page Number 1 of 1
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Fax to Travel Department: 305-348-6998

Chapter 3 – Canceling\Deleting a TAR


Canceling or Deleting a TAR are functions that only personnel in the Travel Section can perform. Please contact them directly if there is a need to Cancel or Delete a TAR.

Travel and Expense


Travel Authorization




[Add](#)
Create/Update a Travel Authorization and submit it for approval or save for further work.




[Modify](#)
Change an existing Travel Authorization and submit it for approval or save for further work.




[View](#)
Check the status of an existing Travel Authorization request.



[Delete](#)
Remove a Travel Authorization from the expense system.



[Cancel](#)
Cancel an Approved Travel Authorization.



[Print](#)
Print a hardcopy of a Travel Authorization.

Appendix A

SPECIFIC 'EXPENSE TYPE' INFORMATION

Airfare – Common Carrier

- Originating Location: The city from which travel begins. (This should default from the Header information)
- Select Travel To: (This should default from the Header information)

Auto Rental

- Merchant – Enter Auto Rental merchant..

Per Diem – Meals

- Amount – Follow State Rules on Per Diem amounts and Meal Allowances. Links providing Per Diem information for international travel are displayed below expense type for your convenience
- Start Time – Enter the time of departure from home or headquarters (cannot exceed two hours for domestic or three hours for international travel, i.e. if flight leaves at 9:00am to Tallahassee then start time cannot be earlier than 7:00am)
- End Time – Enter time of arrival to home or headquarters following above instructions.

Hotel \ Lodging

- Number of Nights – Enter number of nights spent at hotel

Registration

- Merchant – Enter name of organization, merchant, vendor being paid
- Description – Enter any additional information as desired

Mileage

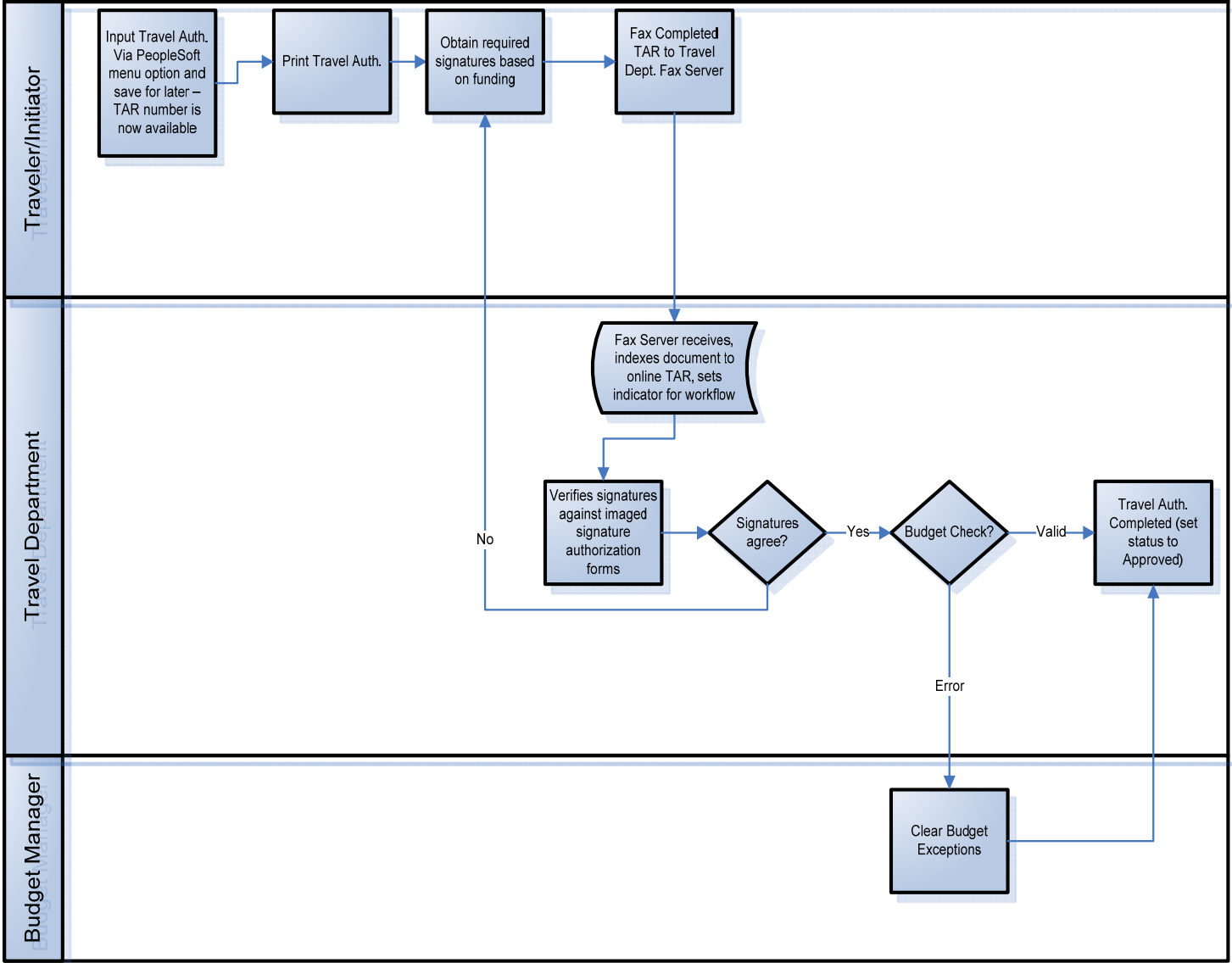
- Number of Miles – Enter number of miles from Origin to Destination
- Originating Location: The city from which travel begins. (This should default from the Header information)
- Destination Location: (This should default from the Header information)

Incidentals

- Description – Enter description of specific expense (i.e., cab, official phone calls, tolls, parking fees, etc.)

Appendix B

FIU Travel Authorization Workflow



Appendix C



FLORIDA INTERNATIONAL UNIVERSITY

Non-Employee Information Form for Travel and Expense Reimbursement

PERSONAL INFORMATION:

PERSONAL INFORMATION:		PANTHER ID:
Last Name:		First Name:
Telephone:		Social Security #:
Fax:		E-Mail:

HOME ADDRESS:

Country:		Is this your...
Address 1:		<input type="checkbox"/> HOME <input type="checkbox"/> OFFICE
Address 2:		Use this address for Payments
County		<input type="checkbox"/> YES <input type="checkbox"/> NO
City/State/Zip:		

MAILING ADDRESS:

Country:		Is this your...
Address 1:		<input type="checkbox"/> HOME <input type="checkbox"/> OFFICE
Address 2:		Use this address for Payments
County		<input type="checkbox"/> YES <input type="checkbox"/> NO
City/State/Zip:		

FOREIGN ADDRESS:

Country:		Is this your...
Passport #:		<input type="checkbox"/> HOME <input type="checkbox"/> OFFICE
Address 1:		Use this address for Payments
Address 2:		
Address 3:		<input type="checkbox"/> YES <input type="checkbox"/> NO
Province:		
City:		
Postal Code:	Country Code:	

Name of Individual Completing this Form (First Initiator):

First Initiator Print Name:	Panther ID:	Telephone:
Dept/Proj ID		Date:

Return this form to the Controllers' Office CSC-3rd Floor or Fax to 305-348-1909

New Vendor Information Form Last Update: 11/5/2007