Travel Authorization Procedure

Checklist:

Supporting documents

- Meetings and conferences-Conference Agenda and Invoice/receipt with \$ amount
- Automobile Mileage- Googlemap, Mapquest (From Assigned Campus/Home (whichever is the closest) to Conference Location).
- Air Travel-Booking confirmation/Receipt with \$ amount
- Hotel/Lodging-Booking confirmation/Receipt with \$ amount
- Miscellaneous (Parking, Transportation (Ex: Lyft, Uber, Taxi), Baggage, Wifi)- Does not require supporting document until you submit Expense Report
- Meals (Breakfast \$10, Lunch \$15 & Dinner 21= Total \$46/a day (please review conference agenda if meal(s) provided. If provided, only need to submit meal(s) that is not provided. Supporting document is not required for both Travel Authorization and Expense Report
- Approval (If you receive an approval from Academic Senate)

GL String/Budget String for Accounting Details

Need Fund-Department-Product (Activity)

Account code will be provided automatically in Peoplesoft

1. Log into PeopleSoft using myportal.sdccd.edu

By logging into mySl protected by privacy	OCCD, you are agreeing not to dis laws. Unauthorized access and/o	close confidential information r use of this system is prohibited.
User ID:	fyumul	
Password	•••••	*
	Sign In	Forgot your Password?
Regular system mainte	nance takes place between 04:00 an	d 06:00 AM PST on Thursday mornings
During this period certs	in sections of the system may not be	available for use.

2. Click on Finance Dashboard icon



3. Click on Travel & Expense



4. Choose Travel Authorization

Travel Authorization



- 5. The Empl. ID field will default to your Employee ID from your PeopleSoft profile
 - a. You can click on the magnifying glass to search for an Empl.ID if necessary

Find an Existing Value Add	a New Value
Empl ID 0002066081	Look Up Empl ID
Add	Search by: Empl ID begins with
Find on Evicting Volue Add a Ma	Look Up Cancel Advanced Lookup Search Results
Find an Existing value Add a Ne	View 100 First I -138 of 138 Last Empl ID Name 0000018022 Bennett, James

6. Click on "Add" to choose your TA creation option.



7. Complete *Business Purpose (Choose Professional Development), Description and Date From and Date to of travel.

Default Location	Q
*Date From 01/28/2019 3 *Date To 0	1/30/2019 🛐
	Default Location *Date From 01/28/2019 3 *Date To 0

- 8. Enter Expense Type. Please make sure to complete boxes with * symbol **Payment Type** Employee Paid versus Prepaid
 - a. Employee Paid- Employee will pay first then will be reimbursed after conference
 - b. Prepaid- If the District will pay the supplier directly (If you choose this method you will need to do an additional step after TA has been approved- Please see Pre-Payment Request Instructions for procedures and timelines)

Project	ed Expenses 👔							
Expand /	Al Colapse Al					Totals (1	.ine) 164.59 USD	
	*Date	*Expense Type		*Description		tQuesost Tuno	*Amount Curren	cy
v	01/22/2019 📑	Air Travel	v	* ARTRAVEL	D	Employee Paid	164.59 USD	H H
	"Billing Typ Ticket Numbe	e Internal Dis 🗸				Prepaid Airtare-Baldoa Travei Prepaid Hotel & Conference Fee Prepaid Travel Expense-Other		

Amount box is greyed out

In order to enter an Amount on the greyed box, you will need to complete the number of nights and nightly rate. Once boxes are completed- the amount will appear on the greyed box. (Also applies to Meals and Automobile mileage)

Project	ed Expenses 🕢					Totals (1	Line) #00.00 USD	
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	"Billing Type Internal Dis 🗸							
	Number of Nights 3							
	"Nightty Rate 200.00							
	Accounting Details (7)							

9. Accounting Details- Expand the triangle. Enter the GL String# that was provided to you to pay for your conference. Enter Fund/Dept/Product. Account code should already automatically filled in (do not change).

– A	Accounting De Chartfields	tails ?]	ΓΉΗ AN DO FOR ΓRA	E GL ST EXAME NOT US GL ST VEL	RING B PLE SE. PLE RING T	ELOW (ASE ASI HAT W	1110 K SU ILL F	9-42010-6 PERVISC PAY FOR	72000) IS DR : YOUR
	Amount	*GL Unit	Fund		Dept		Product		Account	
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*If you are using 2 or more Budget# to pay for your travel and need to split cost you can an additional Chartfield by scrolling on the right until you see the + plus sign then click the button.

Chartfield	is 💼												
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Once added you will now see multiple Chartfields and you can split the amount of the line item per GL String#.

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*It's best practice to hit the Save for Later button after entering an Expense Line Item to ensure work is being saved.

10. To add other Expense line item, click the + plus sign button. Complete and fill necessary information.

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11. After adding all Expense line items, upload supporting documents by clicking the paperclip symbol or Attachment link. Click Add Attachment→Click Browse→Find document→Choose document then click Open button→Upload→Repeat if you have multiple documents to upload→Once all documents have been uploaded press OK button.

"Business Purpose Protoco "Description CONFE	aonal Davidopment V	Orhaut Location "Date From 01/28/2219 16 "Date To 01/29/2 & Attachments	919 🖬 Rəferen	100	
Projected Expenses (2) Expand All Collapse All			Totals	(2 Lines) 165.34 USD	
		Travel Auth Attachments	;		
Travel	Authorization ID NEXT	File Attachment	>	<	
Details File Name Description View			Help Browse	비 (코) 대 First Date/Time Stamp	. (1)
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12. Review your line items and ensure everything is correct. Then click Summary and Submit button.

		(N	ew Window Help Personalo
Create Travel Authorization		Save for Later	Summary and Submit
Floreniza Yumut 🛞		Actions Choose an Action	¥ 00
"Business Purpose Protessional Development	Default Location		
"Description CONFERENCE	"Date From D1/25/2019 (B) "Date To 01/29/2019 (B)	Reference	9
25 127 Tar	J Attachments (1)		

13. Click the check box. Wait until Submit Travel Authorization button turn from grey to yellow color. Then click submit.

Create Travel Authorization

*Business Purpose Professional Development	Default Location
*Description CONFERENCE	*Date From 01/28/2019 3 *Date To 01/29/2019 3
	Reference
vtals ? 🖉 View Printable Version	○ Notes
Projected Expenses (1 Line) 165.94 USD	Denied Expenses 0.00 USD
	Total Authorized Amount 165.94 USD

14. Confirm that the TA was "Submitted for Approval". Ensure status states Submission in Process/Submitted for Approval. If it states "Pending" it means it has not been submitted. Record the assigned TA# for your reference.

eral Information	
Description NLANE_2016-08-31	Authorization ID 0000001762
Business Purpose Professional Development	Comment
Status Submission in Process	

Please allow 7-10 business days for Approval. Approval notification will be sent out via email. Also, please check your email for revision notification. If TA is sent back for revision, please ensure to make necessary changes and resubmit to get routed for approval review.

For status update or if need assistance filling out their TA- Please contact Business Services at ext.4821 or vial email.

Damella Abbott – <u>daabott@sdccd.edu</u> Marylou Madrid – <u>mnmadrid@sdccd.edu</u> Floreniza "Carla" Yumul – <u>fyumul@sdccd.edu</u>