A Travel Authorization is used to provide an estimate of travel related expenses and manage the pre-trip approval process. A Travel Authorization can be created, printed, submitted for approval, viewed (withdrawn), cancelled (to reverse an encumbrance) or deleted.

**Note:** International travel must be approved by the International Center. Please see [International Travel](#) for additional information.

**Travel Authorization Creation**

To create a Travel Authorization navigate to **Nav Bar > Navigator > Employee Self-Service > Travel and Expenses > Travel Authorizations > Request Travel Authorization**

![Travel Authorization](#)

**Step 1.** Enter the Empl ID of the person for whom the Travel Authorization is being created. Then select **Add**.

**Tip:** Proxies can select the magnifying glass icon to view those employees for who they have been granted access to per department Business/Expense Manager or Lead Fiscal Officer.

![Create Travel Authorization](#)

**Step 2.** Enter Business Purpose, Description, Default Location (leave default location blank if traveling to multiple destinations), and From and To Dates of the trip.

**Step 3.** Populating the Travel Authorization - the Travel Authorization may be populated by using the **Quick Start** menu or continue by entering the detail line information manually.

**Tip:** Standard templates have been created for Out of State, International and Student International, grouping commonly used Expense Types to provide efficient data entry. To populate the Travel Authorization select a template, enter date range of trip and select Expense Types for one or all days, then select **OK**.

![Quick Start](#)
For each line of the Travel Authorization the Date, Expense Type, Payment Type and Amount are required. Other fields that may be required base on the Expense Type are: Description, Location (if not the default location), Confirmation Number (Airlines), Merchant Description and Mileage. To add or delete lines to the Travel Authorization select the signs at the right of each line. Select the attachments icon to add supporting documentation or receipts as required.

Expenses Types are categories of spend which are associated to specific general ledger account numbers. The Payment Types of Central Billing Card, University Paid (Procurement Card or Purchase Order), Wex Virtual Card or Pay Only will populate a check in the Non-Reimbursable check box.

To view the Accounting Details select the arrow to expand. Speedtypes will generally default from the employee/student profile but may be updated in the Accounting Details section as needed.
Travel and Expense - Travel Authorization with Cash Advance Option

Cash Advance Creation (optional step)
To apply for a Cash Advance the traveler must be traveling internationally or with a sponsored group.

Select the Actions menu item of Create Cash Advance from the Travel Authorization and then GO to populate the Cash Advance. A second window/page will be displayed (if not check for pop up blocker).

The required fields for Cash Advance are Business Purpose, Advance Description, Reference (Travel Authorization Number), Due Date, Source of ACH/Check Advance, Description and Amount. Select the attachments icon to add supporting documentation as required.

By checking the box and selecting “Submit Cash Advance”, the employee acknowledges that they have read the requirements and rules and agrees to comply with the policy.
Step 4. Upon completion of the Travel Authorization, select **Summary and Submit**.

**Note:** If a **Proxy** is creating the Travel Authorization on behalf of the employee, they will need to click the “**Notify**” button at the bottom of the page to notify the employee to submit the Travel Authorization. The notification will contain a link. The employee selects the link to sign into PeopleSoft Financials, reviews and submits the Travel Authorization.

By checking the box and selecting “Submit Travel Authorization”, the employee certifies that the costs are a reasonable estimate that comply with the University’s expenses policy.

The employee will receive a Confirmation that identifies those projected expenses both reimbursable and non-reimbursable.

**Common Travel Authorization Errors to Note:**

- Not submitting the Travel Authorization in advance of the travel dates.

- Non-reimbursable flag not being checked for Payment Types of Central Billing Card, University Paid, Pay Only or Wex Virtual Card (which encumbers the budget when not checked).