ГССТ	Florida State College	MYFSCJ FLUID CHANGES			
F3C]	at Jacksonville	Document	Creating a Travel Authorization		
		Publish Date	4/25/2021		
Overview	This document will share how to Create a Travel Authorization using the Fluid Navigation in PeopleSoft.				
Target Audience	Staff, Faculty, Managers				
Office	Finance				
Contact(s)	AccountsPayable@fscj.edu				

Procedure

1. Navigation: Employee Self Services > My Expenses tile > Travel Authorizations tile



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- 2. Click on the "Add a New Value" tab.
- 3. Enter in the "EMPL ID" of the employee traveling. Click "Add"

- 4. In the "Business Purpose" drop down, select the type of travel. In the "Description" box, add a short description of the travel. Enter the travel dates in the "Date from" and "Date to" boxes.
- 5. Create the line items for the estimated cost of the trip. Include airfare, lodging, per diem food costs, taxi fare or car rental, registration fees and any other cost that would be associated with the cost of the trip. After the TA is approved, and upon the return from the travel, the TA will be used to create the expense report to reimburse the employee's out of pocket cost and to create a record of the total travel cost for the college.
- Make sure the following fields are filled out when creating the line items. "Date", "Expense Type", "Description", "Payment Type", "Amount", and "Billing Type".

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7. For "Payment Type" select from the drop down one of the following: "College Prepaid", "Pcard Prepaid", or "Employee Paid". College Prepaid and Pcard Prepaid are non-reimbursable and Employee Paid is reimbursable. If you are traveling, but all expenses will be paid by Pcard or College Prepaid, you do still need to complete a Travel Authorization, even if you will not be reimbursed any funds. Travel Authorizations must also be included when reconciling Pcard transactions related to travel. No travel purchases should be complete until after the Travel Authorization has been completed and approved.

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8. When you select an option from the "Expense Type" drop down, different options will appear based on the expense type. There are different requirements for each type. The example shows Registration Fees, which requires the "Destination Location". The "Destination Location should default to FSCJ. If it does not, click the magnifying glass to select it.

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- 9. Click the down arrow next to "Accounting Details" to expand it. Enter the amount and the chartfields for this expense. These should default to the employee's budget, but double check them. Add the "Account", and if applicable the "Project" and "Bud Ref". If the chartfield boxes turn red, use the magnifying glass to select the correct chartfield.
- 10. To add another expense to this Travel Authorization, select the plus sign (+) to the right of the "Amount".

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11. Add any needed documentation. Click the "Attachments" link in the center top of the page and follow the prompts to add all documents. Documents that may need to be attached include: conference information, lodging quotes, airfare quotes, rental car quotes, athletic event information, team roster, team season schedule, and other planning documents.

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12. When all lines are added and attachments added, click "Summary and Submit" in the top right.

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13. On the "Summary and Submit" page, review the information and when you are ready to submit, check the box at the bottom of page and click "Submit Travel Authorization".

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14. A box will pop up for you to click on "OK". Click "OK". Once the travel authorization has successfully been submitted, you will receive the confirmation message in red. The submission process is only complete if you receive the red text confirmation. If you do not get the "successfully submitted" message, the Travel Authorization has <u>not</u> been submitted.

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- 15. The travel authorization must be submitted before the trip takes place, otherwise PeopleSoft will not allow you to submit, or allow your supervisor to approve.
- 16. After the employee has returned from travel, an Expense Report must be completed. The Travel Authorization for that trip should be linked to the Expense Report. If the Travel Authorization is no longer needed, but the travel did not take place, the Travel Authorization should be closed or deleted.
- 17. Process complete.