Instructions for Travel Authorization

Definitions:

Travel authorization: A form that an employee submits to acquire the permissions needed to receive reimbursement for travel and provide the University with some expense estimates. Travel Authorizations are required for all out-of-state (which includes international) travel. UGA policy considers travel out-of-state if the travel is more than 50 miles outside of Georgia.

Speedtype: A 10-character alphanumeric shortcut for budget and funding,

Before you get started, have the following information ready!

- The details for the account (i.e., speedtype and/or full account information) that you plan to charge the travel expenses to. If you received a travel award, this information will be in your award letter. If your major professor or another faculty member is providing funding support, obtain the account details from that person.
- Conference information, including name, dates, location (city, state), and estimated expenses (e.g., airfare, ground transportation, lodging, meals).
- For lodging and meals, visit https://www.gsa.gov/travel/plan-book/per-diem-rates. and search for the city and/or state where your conference is being held to obtain the federally approved lodging and per diem amounts.

Note, the amount of funding requested in your Travel Authorization should not exceed the amount of funding provided in the travel award you received. See the example provided on the next page for more information.

For the illustrated instructions below, we are going to use the following example:

- Conference: Example Conference
- Location: New York, NY
- Dates of conference: June 2 to June 4 (2 full days, 1 half day)
- Dates of travel: June 1 and June 4
- Estimated cost: $1913
- Travel award: $1750*

**** Your Travel Authorization should not exceed the amount of funding provided in your travel award.***

Item	Description	Estimated Cost	Cover by Travel Award
Airfare	Airfare from ATL to JFK and back	$300	$300
Conference registration	Registration for the conference	$250	$250
Lodging*	$281 per night (3 nights) at the conference hotel	$843	$843
Ground transportation	Groom Shuttle to Airport and back to Athens ($55 x 2) Airport parking (ATL park and ride = $10/day x 4 days) Uber to conference hotel and back to airport ($50 x 2)	$250	$250
Meals**	Breakfast and dinner, conference includes lunch	$270	$107
Total		**$1913**	**$1750**

***Daily lodging rate calculation:** In New York City in June, the daily lodging rates (excluding taxes) is $281. For three nights, this would be $843. This is the maximum daily rate you will be reimbursed for.

****Daily meal and incidental calculation:** For New York City, the maximum daily total you can be reimbursed for is $92, including a maximum of $23 for breakfast, $26 for lunch, $38 for dinner, and $5 for incidentals. If we assume that the conference is providing lunch, the maximum amount you can be reimbursed for is $66 ($23 for breakfast, $38 for dinner, and $5 for incidentals.) Additionally, the rate changes for travel days. On the first and last day of travel, you can be reimbursed for up to $69. So, for 4 total days, including two travel days and two days with breakfast and dinner, you can be reimbursed $270 for meals (Day 1: $69, Day 2: $66, Day 3: $66, Day 4: $69). Of course, you will only be reimbursed for what you spend, not any extra. To calculate the per diem allowances for your travel destination, go to https://www.gsa.gov/travel/plan-book/per-diem-rates.

Account Information: This will be provided to you in your travel award letter.

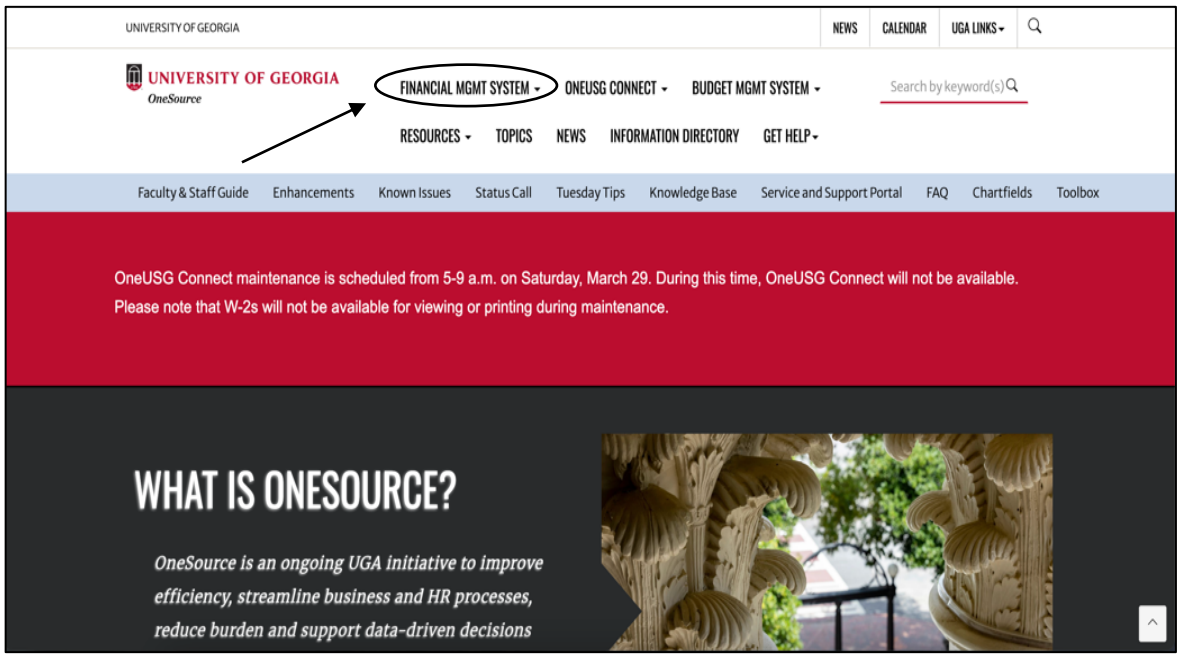
- $1000 was provided by the graduate school
- $500 was provided by the department
- $250 was provided by your major professor

Award Source	Award Amount	Speedtype	Fund	Project	Department (Dept)	Class (Cl)	Chartfield 1 (Cf1)	Budget Reference (Bud Ref)
Graduate School	$1,000.00	XXHDFSGATV	10500	12345	12345OPR	11800	XXGSTVL	2025
HDFS Department	$500.00	XXXSSHDFS1	10500	54321	54321OPR	11800	XXGSTVL	2025
Major Professor	$250	XHDFSXX1X2	10620	67890	98765OPR	11987	XXGSTVL	2025

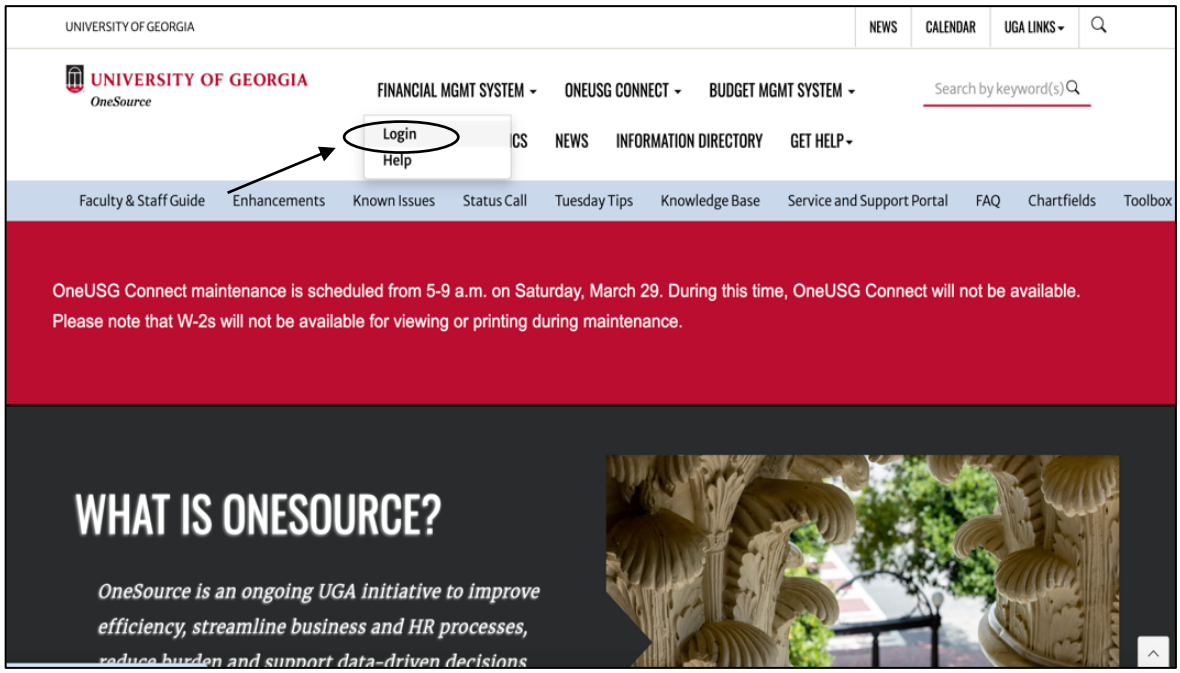
IMPORTANT: The account information above is fictitious for this example.
DO NOT USE THIS INFORMATION WHEN YOU PROCESS YOUR TRAVEL AUTHORIZATION!

Step-by-Step Instructions

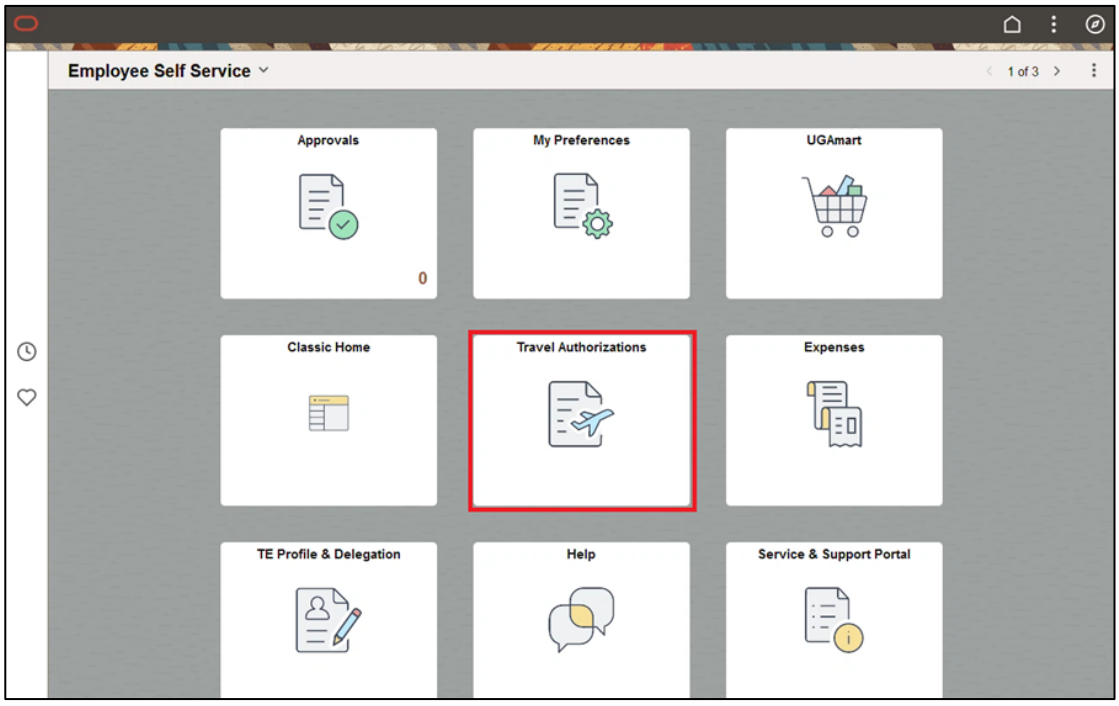
1. Go to **UGA OneSource** at: https://onesource.uga.edu/
2. Click on "**Financial MGMT System**" at the top of the webpage.



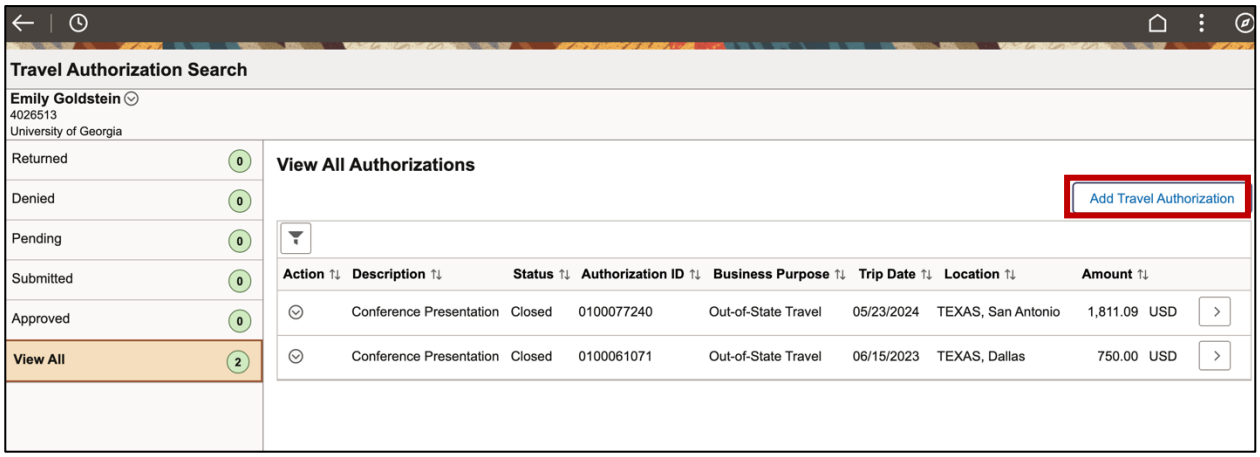
3. Click on "**Login**" and use your UGA ID to login. (***Note**: You must be on UGA wifi (eduroam) to access the financial management system. If you are not able to complete this on campus, you must access the financial management system using a VPN.If you need help downloading the VPN, go to https://eits.uga.edu/access_and_security/infosec/tools/vpn/.)*



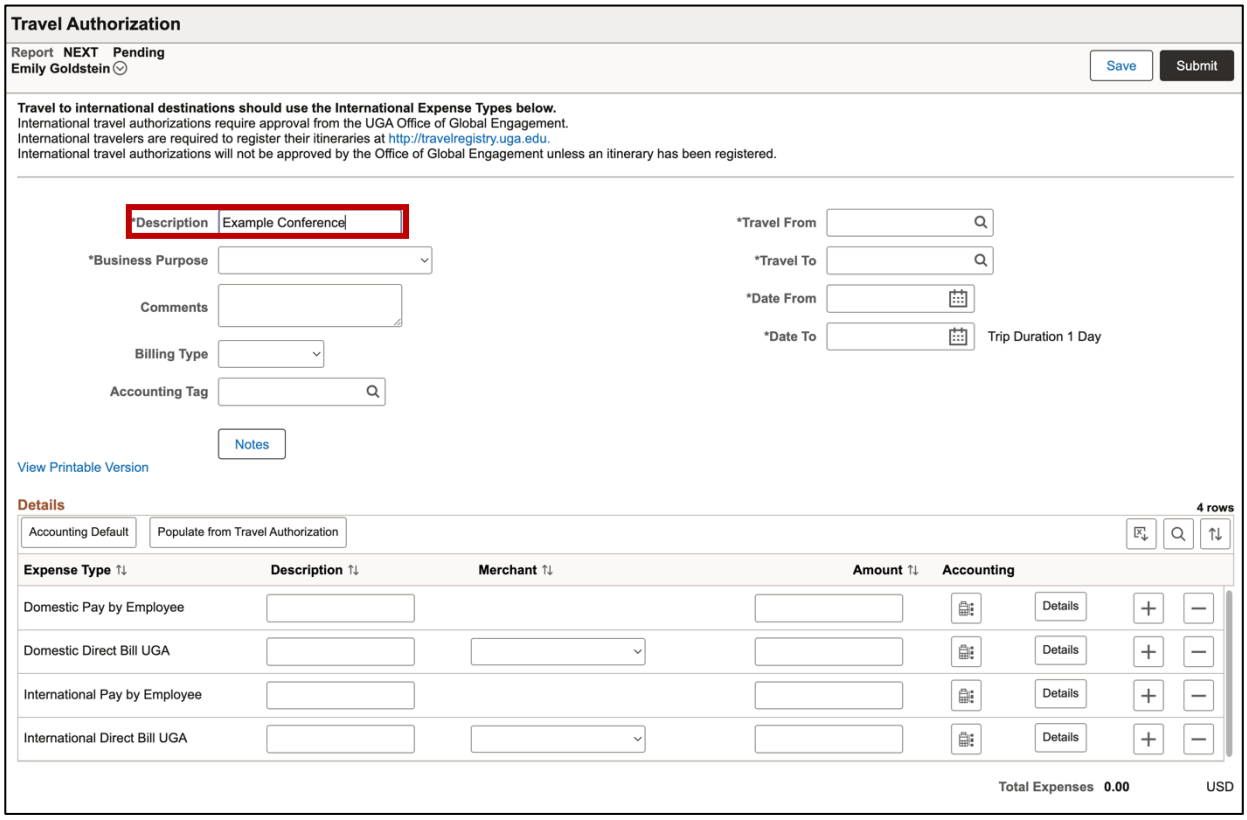
4. On the employee self-service homepage, click the “**Travel Authorizations**” tile.



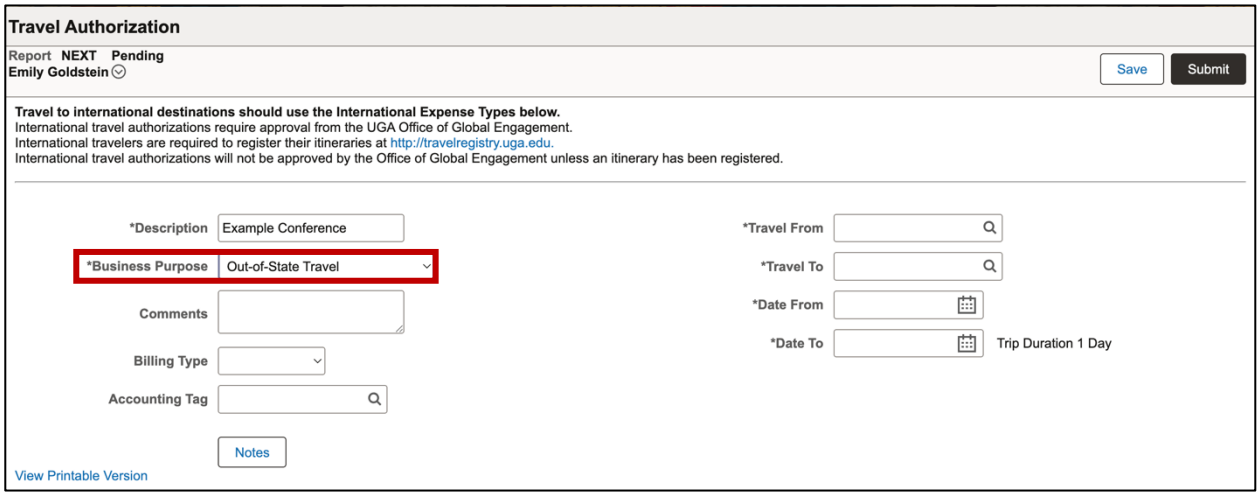
5. Click on the “**Add travel authorization**” button.



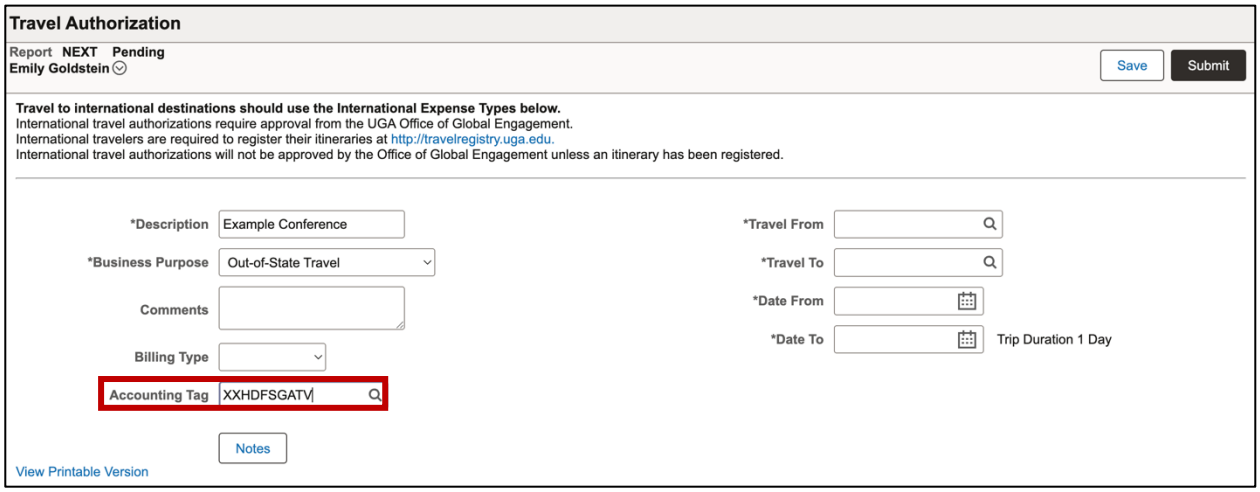
6. The Travel Authorization page is displayed. Enter a brief description of the trip purpose in the **Description** field. If this TA is for a conference you are attending, note this in the description (e.g., NCFR Conference). For the example illustrated above, I have entered "Example Conference".



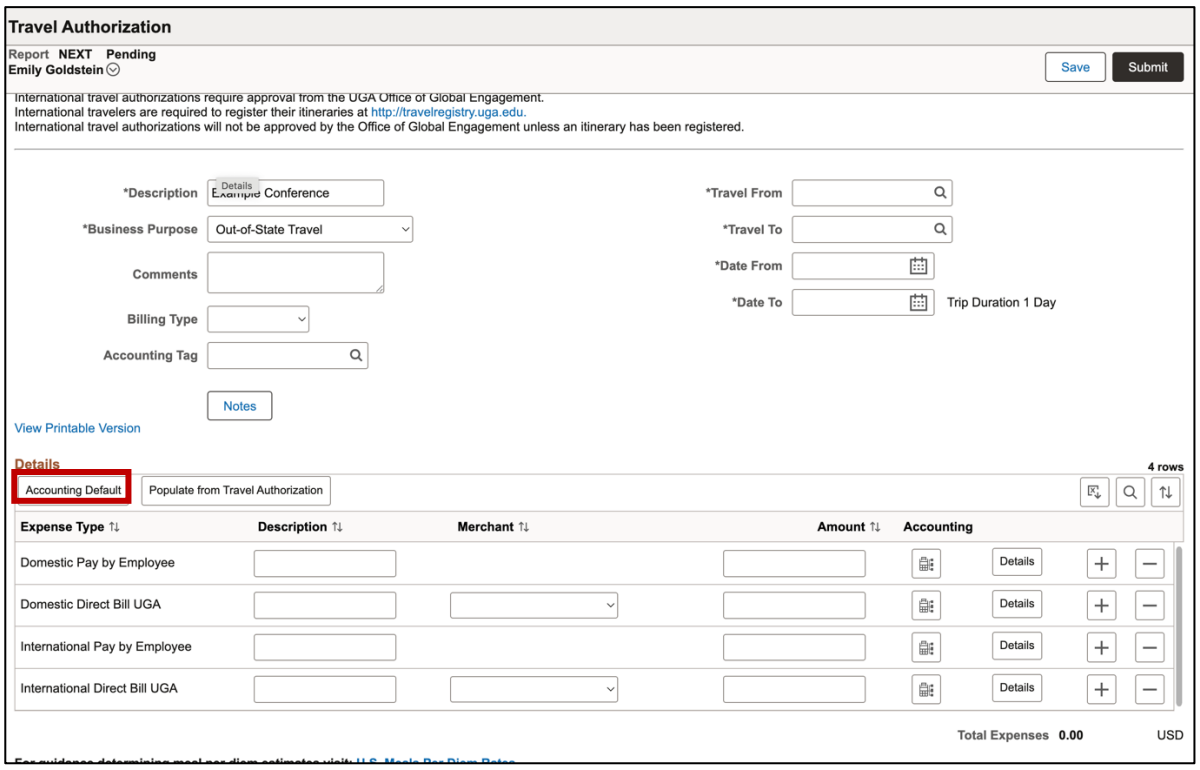
7. The **Business Purpose** field is used to categorize the travel based on type. Please select the appropriate type of travel based on whether it is **In-State** (in Georgia) or **Out-of-State** (which includes international). For this example, I selected out-of state travel.



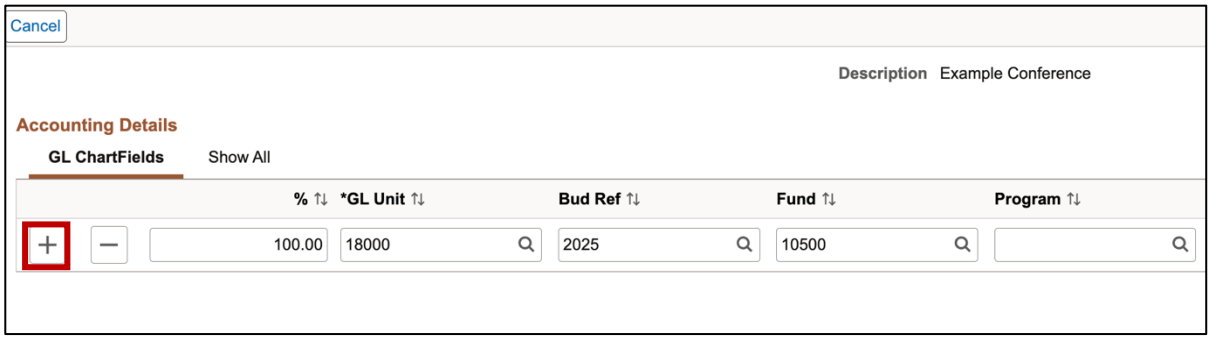
8. If you only have one source of funding, and you have been given a SpeedType, enter it under the "**Accounting Tag**" here. If you do not have a SpeedType, or you have more than one source of funding to help cover your travel costs, continue with steps 9-13 below. In the example illustrated, there is more than one funding source, so we will continue with the next steps and leave the **Accounting Tag** BLANK.



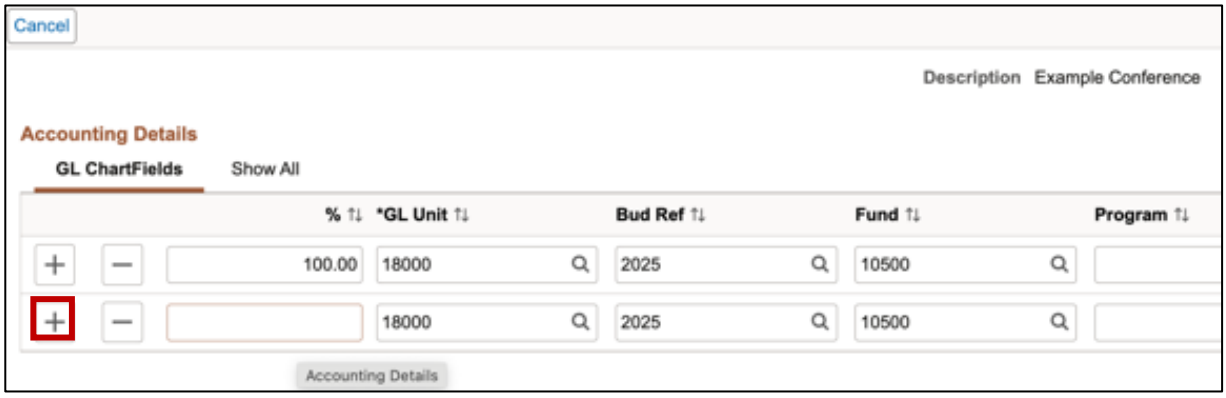
9. If you entered a SpeedType into the "**Accounting Tag**" in step 8, skip to step 14. If not, click on the "**Accounting Default**" button.



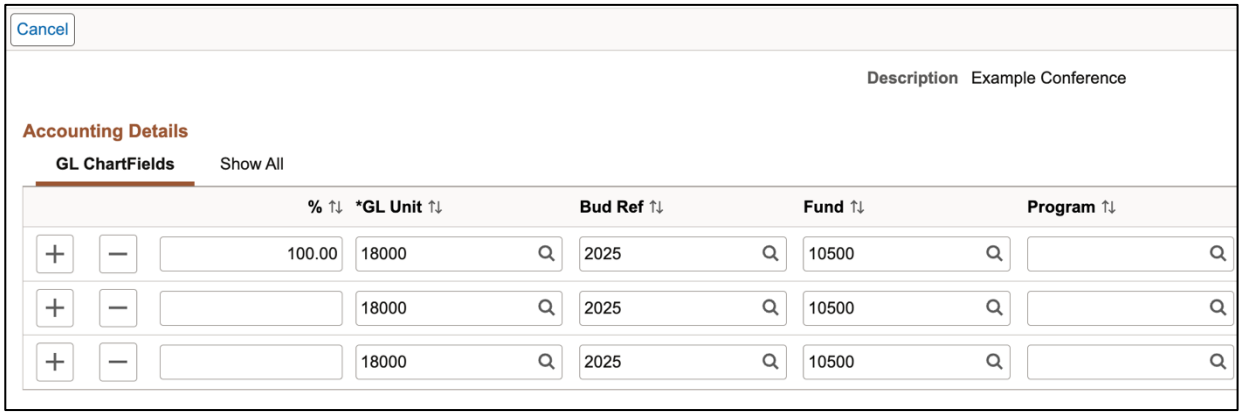
10. This is the travel authorizations default page. You can enter accounting details for the travel authorization here. The information you need will be listed on your travel award letter. Begin by entering the first account information, including the **budget reference, fund, department, class, project, and chartfield 1**. Click the "+" button to add a line for the second account.



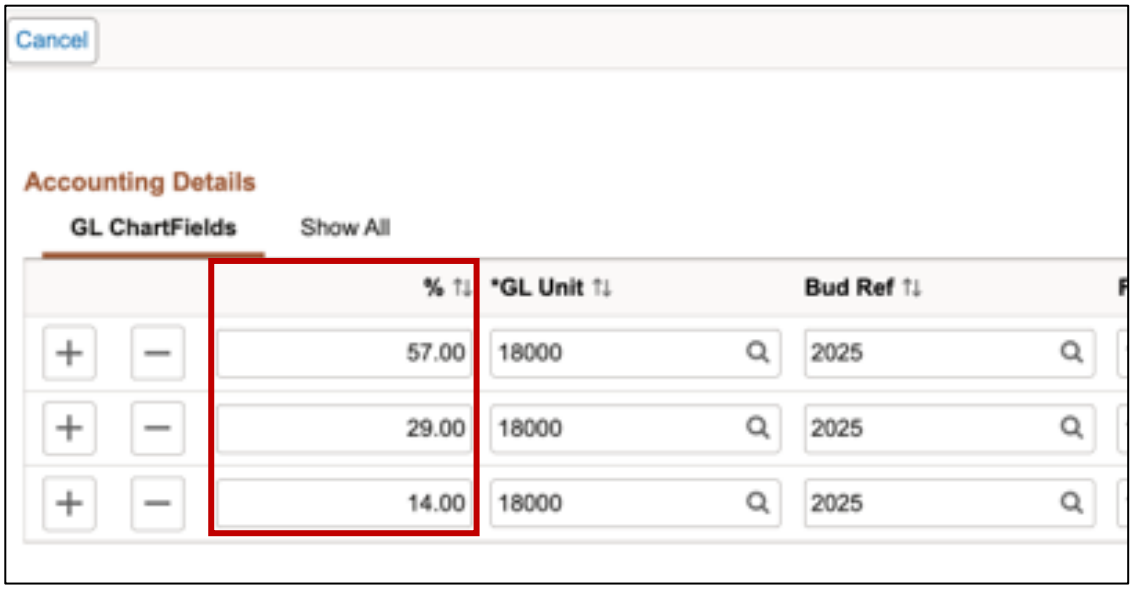
11. Enter the next account information, then click the "**+**" button to add another line (if needed).

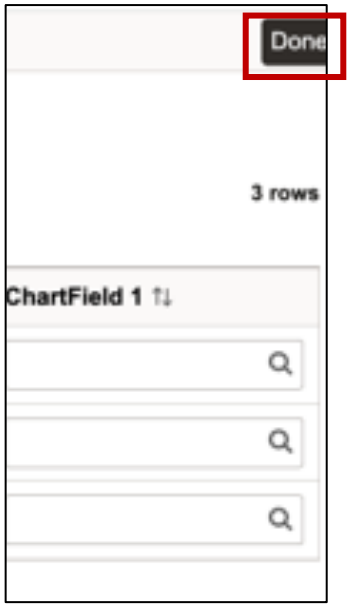


12. Enter the next account information.



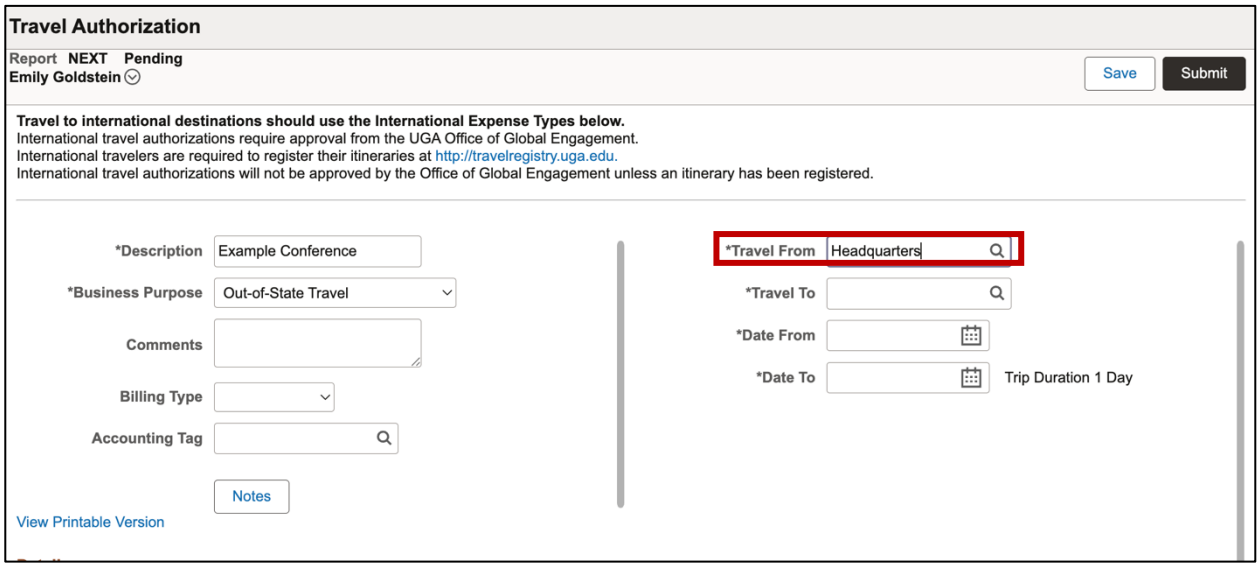
13. In the example, the student is receiving different amounts of funding from each account. So, in the "**%**" column, we need to calculate the percentage of total funding coming from each account. In this example, we are getting a total of $1750 in funding, with $1000 from the graduate school (57%), $500 from the department (29%), and $250 (14%) from the major professor. When you are done, click "**Done**" in the top right corner.



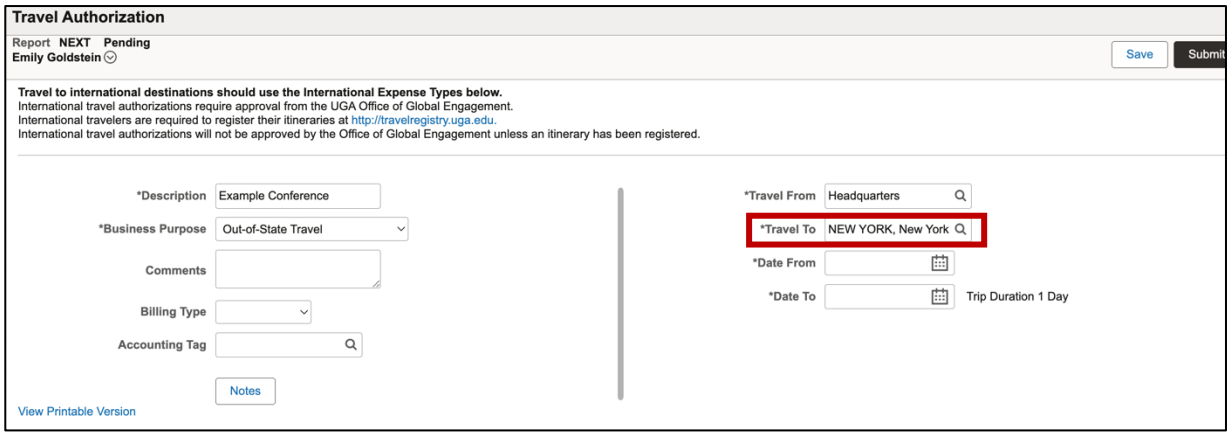


14. Enter the location from which you are traveling in the ***Travel From** field. (**Note:** When selecting a domestic travel location, search by state name, then city name. If the city does not appear, select the state option labeled "Standard Rate" (non-high cost). When selecting an international travel location, search by country name, then city name. If the city does not appear select "Country, Other.")

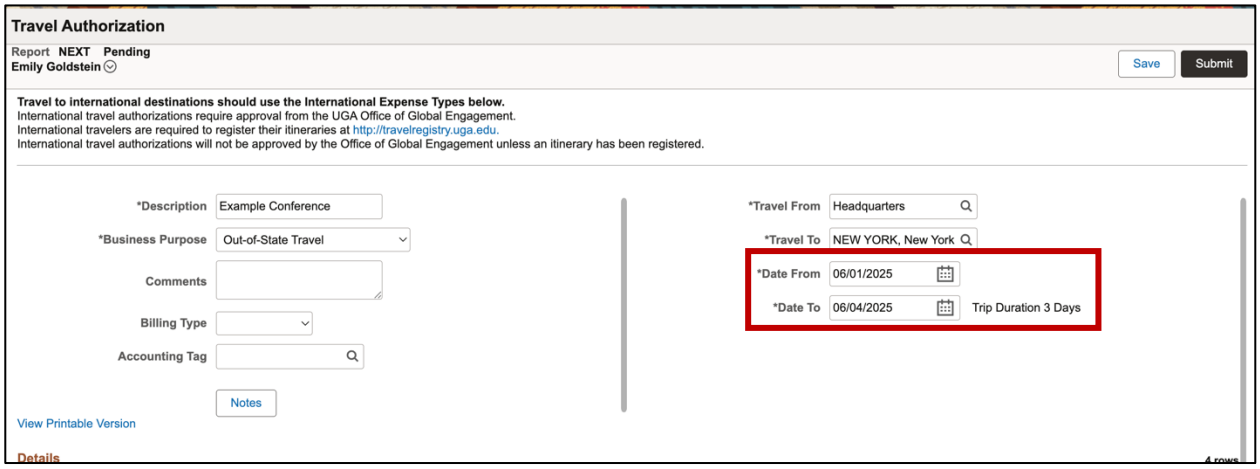
    If traveling from UGA, you can enter Headquarters as your travel from location. Headquarters is a location set up in your travel profile.



15. Enter appropriate information into the ***Travel To** field. For In-State Travel destinations all 159 Georgia counties are listed under Travel To. Select the appropriate county. For this example, I am selecting NEW YORK, New York City.

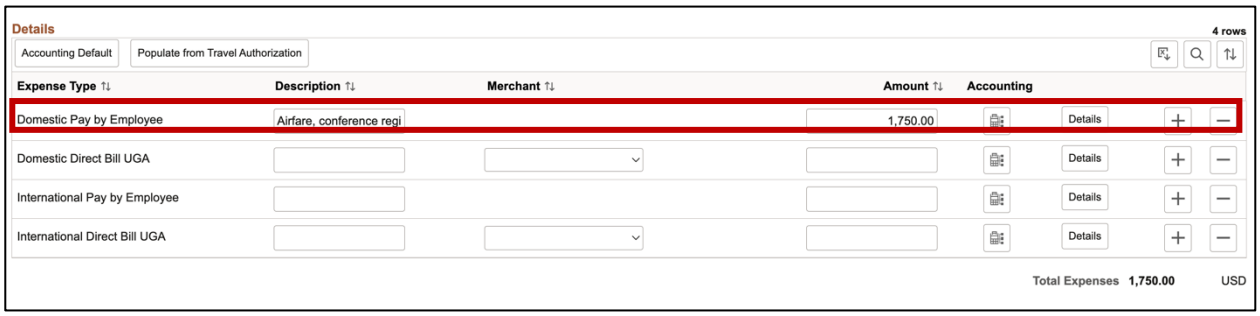


16. Enter the appropriate departure and return dates in the ***Date From** and ***Date To** fields. For this example, the date from is June 1 and the date to is June 4.

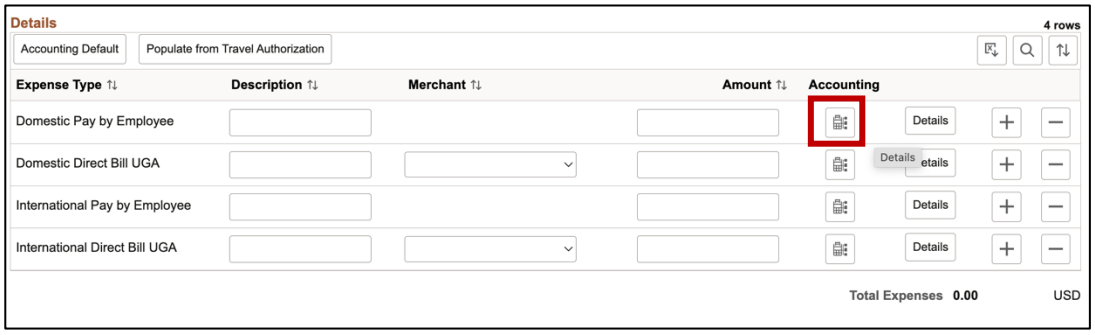


17. In the Details section of the Travel Authorization, you should provide estimates of anticipated expenses for the trip. For **domestic** trips, use **rows one and two** to provide the estimates. For **international** trips, use **rows three and four** to provide the estimates.

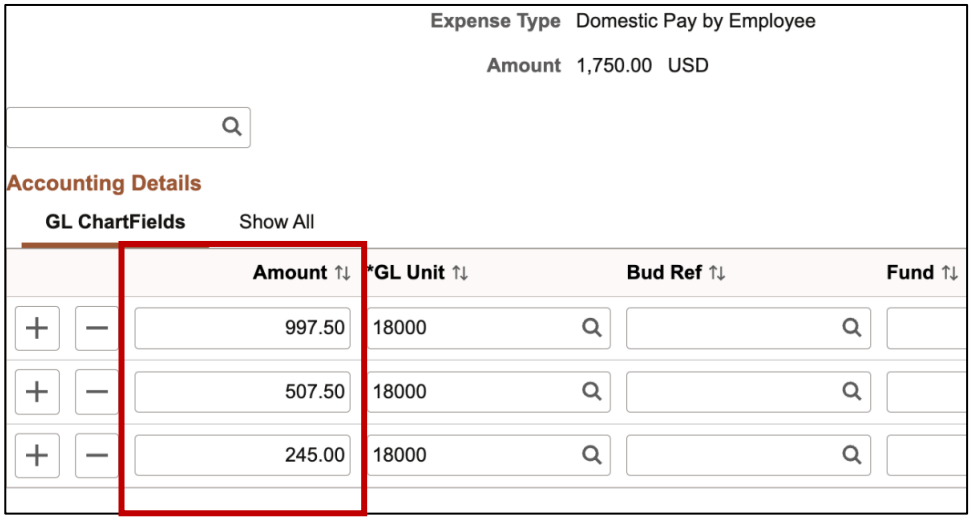
    In the appropriate **Pay by Employee Description** field, enter a brief description of the anticipated expense types the employee expects to incur while traveling, including **lodging, car rental, per diem, conference registration, etc**. This should be your estimated amount. In this example, the estimated amount is $1913 for airfare, conference registration, ground transportation, lodging, and meals. *Students, however, may only be reimbursed for the maximum amount of their award. All other expenses beyond what the award covers will be the student's responsibility.* The total amount is displayed in the bottom right corner.



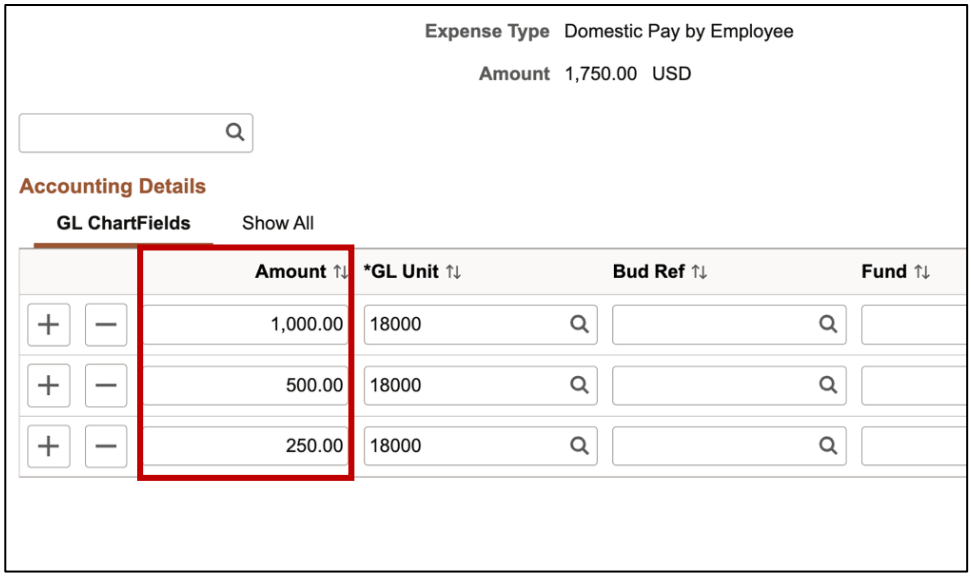
18. To ensure that the percentages we calculated and entered in step 13 yielded the correct amounts, we need to double-check by clicking on the button that looks like a calculator.



The amounts below are very close but not perfect. Edit them here to reflect the correct amounts.



Now, the amounts are correct. Click "**Done**" in the top right corner.



19. Submit your travel authorization by clicking the "**Submit**" button in the top right corner.

