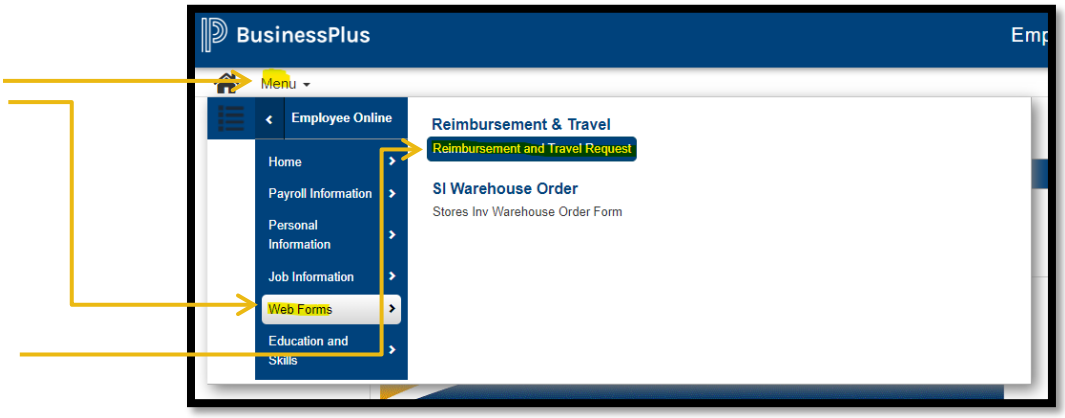
STEP-BY-STEP WEBFORM INSTRUCTIONS

COMPLETING THE PRE-TRAVEL APPROVAL WEBFORM

EMPLOYEE ONLINE

- The *Reimbursement and Travel Request* must be completed by the Employee for out-of-district travel. The form must be approved (as indicated by receiving a travel approval email from IFAS, Workflow) before any travel arrangements are made
- **TIP: Use the Edge browser (Chrome gives some people troubles)**

- Log into Employee Online
- Once logged in, select Menu → Web Forms → Reimbursement & Travel Request



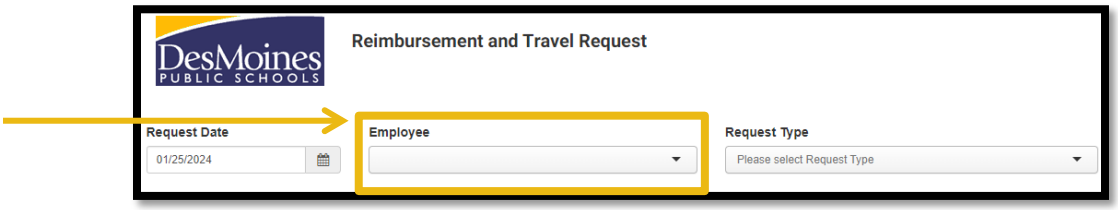
- Log in a second time using the same Employee Online credentials, then the *Reimbursement and Travel Request* form will open

REIMBURSEMENT AND TRAVEL REQUEST FORM

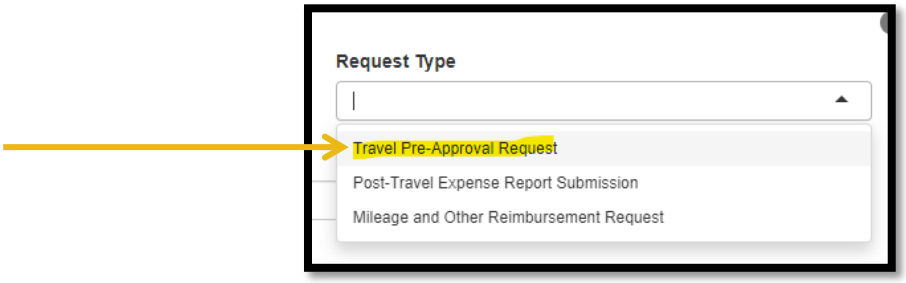
- After opening the web form, **FIRST** hit Ctrl + F5 before doing ANYTHING on the form
  - Ctrl + F5 means hold down the Control key and then push the F5 key at the same time

BASIC INFORMATION

- **Employee:** begin tying your name or employee ID number → Enter / Select your name

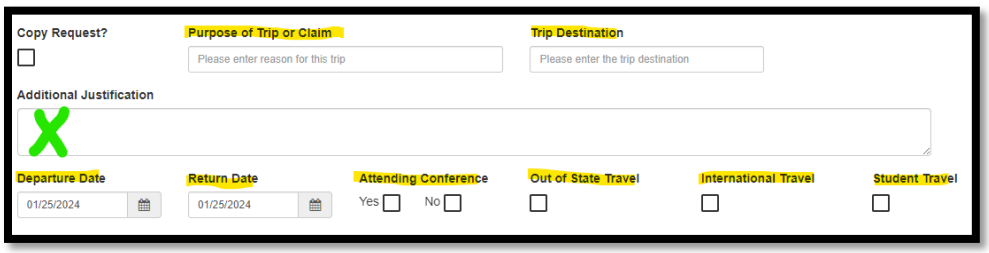


- **Request Type:** drop down, select *Travel Pre-Approval Request;* this will update the form to reflect the required fields



TRAVEL PRE-APPROVAL REQUEST FIELDS

- Complete all fields highlighted below
  - **Purpose of Trip or Claim:** enter the reason for the trip
  - **Trip Destination:** enter the City & State or City & Country, as appropriate
  - **Additional Justification:** Nothing is required at this time; use if there is something a-typical for which prior approval was granted
  - Select the **Departure Date** and **Return Date** using the calendar icons
    - NOTE: Travel is only authorized up to one day prior to start of conference
  - **Attending Conference:** mark Yes or No
  - **Out of State Travel:** select if Yes
  - **International Travel:** select if Yes
  - **Student Travel:** select if Yes
    - NOTE: If traveling with students, the Student Travel Pre-Approval form must be completed first. After receiving approval notification for student travel, complete the *Reimbursement and Travel Request* form

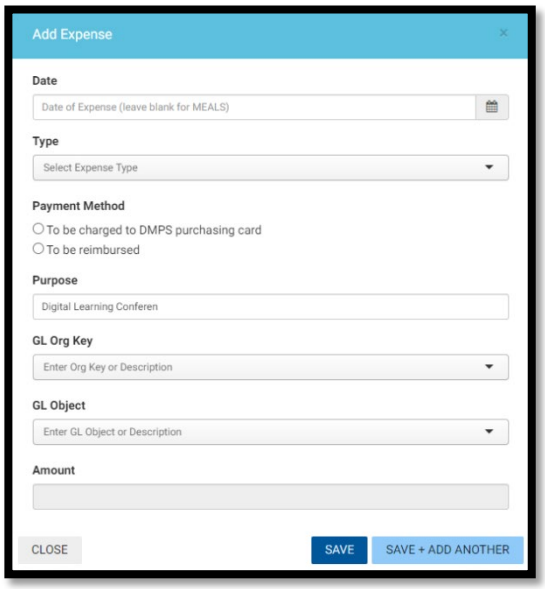


ADDING ANTICIPATED EXPENSES

Procedures for Estimating Allowable Expenses and Expense Limitations/Restrictions are in the Business & Finance Procedure Manual

- Click the **+ Add Expense** button to list the anticipated travel expenses for the trip
  - Anticipated expenses could include: airfare, hotel, conference registration, ground transportation, rental cars, and meals

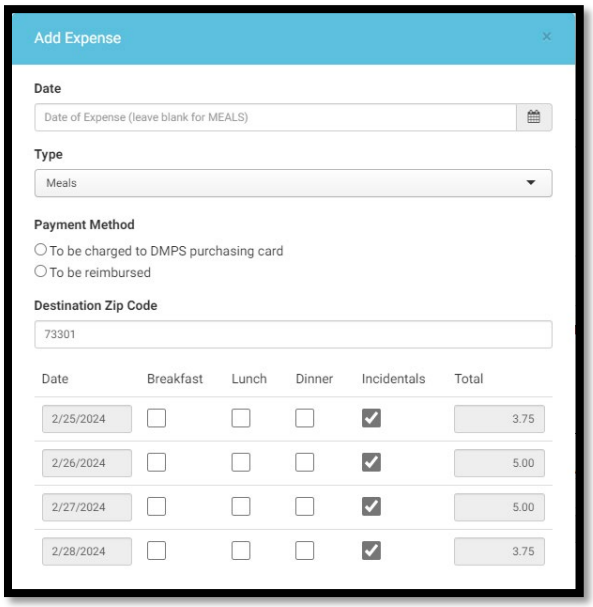
- For each anticipated expense, enter the **date, expense type, payment method, account key** (GL Org Key), **object code** (GL Object), and estimated **amount**



  - **Date:** enter date of anticipated expense
    - For meals, leave blank (*see* meal instructions)
  - **Type:** select appropriate expense type from the dropdown
  - **Payment Method:** select based on expense
    - Conference Registration, Hotel, Airfare, and Car Rental:
      – Must be charged to *pCard*
    - Meals at pre-determined per diem rate:
      – Must be employee-paid and *Reimbursement* after travel
    - Ground transportation, airport parking:
      – May be charged to *pCard* or *Reimbursement*
  - **GL Org Key:** Enter account keys provided by your Office Manager / Bookkeeper/ Administrative Assistant
    - *Conference Registration:* Use PD Key (e.g., EQPD, DWZZZPD)
    - *Meals:* Use a non-grant funded Key (e.g., EQPD, building)
    - *All Other*: Use appropriate Key
  - **GL Object:** Enter object code
    - *Conference Registration:* Use 0595
    - *All Other*: Use 0583
  - **Amount:** Enter estimated cost (**Procedures for Estimating Allowable Expenses and Expense Limitations/Restrictions are in the Business & Finance Procedure Manual**)
  - Click the **Save + Add Another** button until all trip expenses are added
  - After the last expense has been added, click the **Save** button

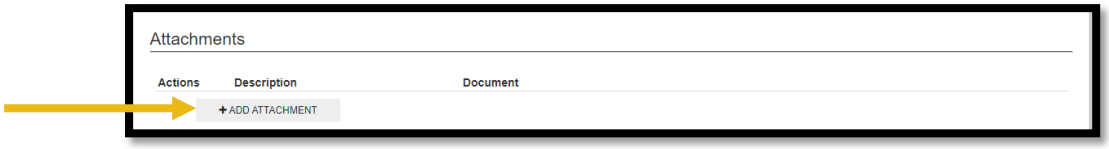
EXPENSES: ENTERING MEAL EXPENSE ESTIMATES

- **Date:** leave blank
- **Type:** select Meals
- **Payment Method:** select "To be reimbursed"
- **Destination Zip:** enter the ZIP code of the city traveling to
- For each day, check the meal boxes that will NOT be provided by the conference
    - The maximum allowable per diem will be calculated total for each day, based on the ZIP code entered (REMINDER: Meals & incidentals for the first and last days of travel are reduced by 25%)
- Federally funded trips cannot use the federal grant account key for meals. Instead use an account key tied to EQPD funds, building funds, or other funds and not the grant account key.



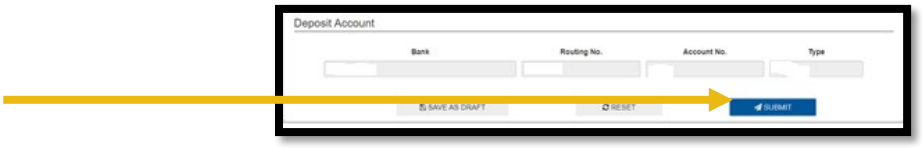
PRE-TRAVEL ATTACHMENTS

- When requesting to travel for a workshop, conference, or seminar, employees must attach a copy of the event's full agenda, including any lodging or meal provisions
    - Use the **+ Add Attachment** to upload with the description *Conference Agenda*



SUBMISSION

- Verify the auto-filled employee direct deposit information
- When all fields are complete, click the **Submit** button



MULTIPLE TRAVELERS

- Each employee traveling must fill out a Travel Prior Approval and Expense Reimbursement form
- However, after one form has been submitted, subsequent travelers can copy the initial submission
    - After submitting the first form, write down the trip's EE# that shows after submission
    - The next employee can use the trip number to copy the trip details to save time with submissions
    - At the beginning of the form, subsequent travelers would check the **Copy Request?** box and type in the EE# in **Trip ID** field
        - Tab away from that field and the rest of the form will populate with the same data
        - Update the form as needed before submitting

POST-SUBMISSION

- Employees will receive a workflow notification email from BusinessPlus showing the trip details and approval status
- Save the approval email as a PDF file with the label "travel approval + trip name"
    - Example: Travel Approval SEL Conference
- This approval email must be attached to the Travel Expense Reimbursement following the trip