UWL Academic Affairs Travel Preapproval Procedure for faculty and Instructional Academic Staff (IAS)
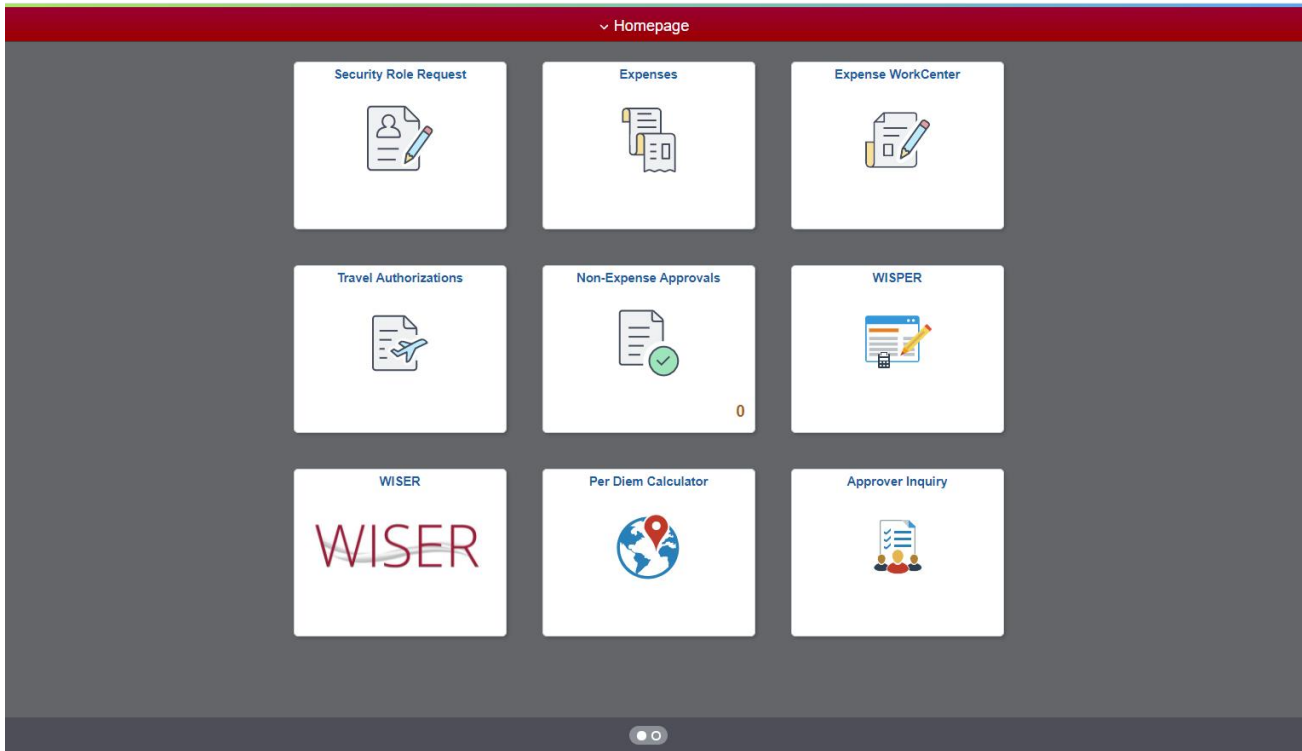
(last updated 2022)

OVERVIEW

All UWL faculty and Instructional Academic Staff (IAS) who are traveling domestically or internationally on university funds for business-related campus absences are required by UW System policy to receive supervisor pre-approval for travel. Faculty and IAS use the e-reimbursement system to both receive travel authorization (preapproval) and submit travel reimbursement. Although the system needs to be accessed twice, most information need only be entered once.

- Travel Authorization (TA) information should be submitted within 10 working days prior to departure.
    - If a cash advance is needed, the Travel Authorization must be submitted 21 working days prior to departure.
- Faculty and IAS who have positions with regular, primarily local, auto-based travel as part of their duties (e.g., SOE faculty/MVAC/Practicum Supervisors) may submit monthly reimbursement submissions in line with the policy indicated below.

Assigning the ADA as a delegate/alternate: All faculty/IAS should indicate their ADA as their travel delegate. It is strongly recommended that faculty/IAS (or the ADA) submit the pre-authorization. For the expense submission, the faculty/IAS should work collaboratively with the ADA to submit for the reimbursement. ADAs are more familiar with the processes and their involvement cuts down on errors and, therefore, speeds up reimbursement time. ADAs should review each TER once complete and submit "notify" and then the faculty/IAS member can submit the report. Please note, it is the responsibility of the faculty member to ensure all expenses are entered correctly/accurately. Thoroughly review each expense report prior to submitting. See How to Assign an Alternate for more information.

Procedure for Preapproval. Following the guidelines for amount of advance time, faculty and IAS should log into the e-reimbursement system and access the "Travel Authorization" tile (left tile, middle row), click on the 'Add Travel Authorization' to complete the information and submit for preapproval. Employees should complete the general information at the top of the page and include estimated and/or known expense information (expense type with amount estimates or known amounts). Please refer to the 'How to Work with Travel Authorizations in the Expense Module' guide for assistance.

Security Role Request

Expenses

Expense WorkCenter

Travel Authorizations

Non-Expense Approvals

0

WISPER

WISER

Per Diem Calculator

Approver Inquiry

Financial Administration

|	
Returned	0
Denied	0
Pending	0
Submitted	0
Approved	0
View All	0

View All Authorizations

There are no Travel Authorizations to display.

Add Travel Authorization

When the supervisor approves, the employee will receive email confirmation.

Procedure for Reimbursement. Once the travel has been completed, employees will access the approved Travel Authorization (TA) and under 'Actions' click 'Copy to Expense Report' to create a new expense report. They will be able to bring in the TA data and pre-populate the expense report with the TA data that was already approved. Employees can then update/modify the estimates to actual expenses, include any additional expenses that may not have been included on the TA, upload appropriate paperwork such as meeting agendas, and submit for approvals leading to reimbursement.
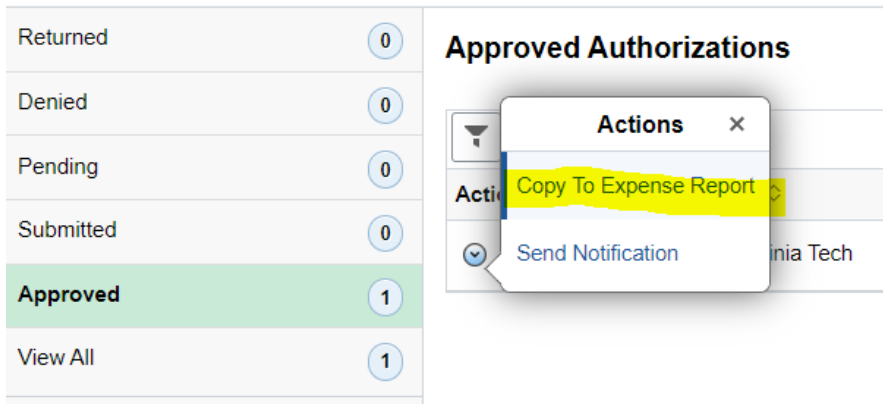
Repeated Travel: Employees can copy previously submitted TAs, change pertinent information, and re-submit as a new TA. This enables previous TAs to be used as a template for specific recurring absences.

Additional Information for Department Chairs

Budgeting: When the TAs are used in this manner, it also gives departments and units an additional budgeting tool. Reports can be run to combine all TAs for the department and project estimated expenses along with the timing in which they're expected to occur.

Supervisor Help – How to work with TA's in expense module

Liability Protection. An employee or agent of the University is protected pursuant to the UW System's self-insured liability program while on university business. This protection applies regardless of whether or not a travel pre-approval is completed. However, the Travel Authorization form does provide evidence of the fact that the individual is or was on university business and this would be useful in the event that this evidence is required.

Driver Authorization/Approval. UW System requires that drivers of any vehicles – including personally owned and rental vehicles – to be authorized to drive on university business.

Please see the below links for more information and the authorization application.

Driver authorization information

Driver authorization application

Note: These procedures were developed by a committee of users in 2015 and updated in 2022.