University of Wisconsin – Parkside
Travel Authorization Procedure

Effective Date: 07/01/2025

Applies To: All University Personnel

Approved By: Lynn Akey, Chancellor

1. Purpose

This document outlines the procedures for obtaining approval for university-related travel through the Workday system. It ensures compliance with university financial controls and promotes responsible stewardship of university resources.

2. Procedure Statement

All university staff must complete a Spend Authorization in Workday prior to incurring any travel-related expenses. This authorization serves as formal approval for travel and is a prerequisite for reimbursement.

3. Scope

This requirement applies to all university staff, including faculty, administrative personnel, and temporary employees, who intend to travel for university-related business, conferences, research, or other official purposes.

4. Procedure

4.1 Pre-Travel Requirements

1. Initiate Spend Authorization:

   1. From the Workday Homepage, click on **Menu**.
   2. Click the **Expenses Hub** app.
   3. Click **Create Spend Authorization**.
   4. Review and update all fields.

      a. **Company**
      b. **Start Date** – first day of trip or expected purchase date.
      c. **End Date** – last day of trip or expected purchase date (same as above).
      d. **Description** – explain request.
      e. **Business Purpose**
      f. **Reimbursement Payment type** – will default to direct deposit.
      g. **Justification** – clarification can be given to clarify the reason for the travel

   3. Click **Add** to add a spend authorization line item.

4. Enter and review fields for the spend authorization line.

   a. **Expense Item** - Select **by Expense Item Group** and select item or search.
   b. **Total Amount** - estimated total cost for spend authorization line.
   c. **Budget Date** - This will autofill as the first date of travel.
   d. **Memo** – details about request.
   f. **Worktags** – Details on funding for item.

7. Review and update Item **Details** section.
   NOTE: Requested details will vary based on expense item.

8. Repeat steps 3-6 to include additional spend authorization lines.

9. Click **Submit.**

2. Submit for Approval:

   - Submit the Spend Authorization for routing through the appropriate approval hierarchy.
   - Incurring expenses and travel must not commence until the Spend Authorization is fully approved.

3. Travel Booking:

   - Once approved, travel arrangements (e.g., flights, lodging) may be booked in accordance with university travel guidelines.

4.2 Post-Travel Requirements
1. Expense Report Submission:

   - Upon return, create an Expense Report in Workday.
   - Attach the approved Spend Authorization to the Expense Report.
   - Include all itemized receipts and documentation for expenses incurred.

2. Reimbursement:

   - Reimbursement will not be processed without an approved Spend Authorization attached to the Expense Report.

5. Compliance
Failure to comply with this procedure may result in denial of reimbursement and/or disciplinary action. Exceptions must be approved in writing by the Chancellor.

6. Resources and Support
Training Materials:
Create a Spend Authorization
Create an Expense Report