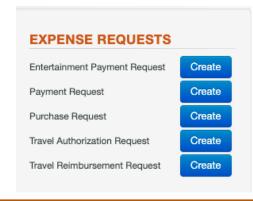
# **Travel Authorization Request System Overview**

Purpose – used to initiate Domestic and International travel request for Faculty, Staff and Students prior to your travel dates.

- You will primarily refer to the Expense Requests to make new requests and/or My Requests to track a request or copy a prior request. Ignore all other sections on home page.
- URL: https://utdirect.utexas.edu/apps/services/requests/
- Two options to make a request: 1) create a new request or 2) copy a prior request from your history

#### \*\*Please consult <u>Texas Global</u> for additional forms and information as it relates to International Travel\*\*

Refer to the Physics Travel Processes website for additional guidance: <u>link</u>

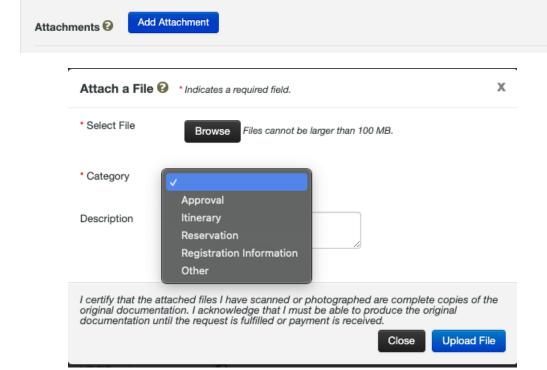


#### How do I submit a NEW request?

- Select "Create" under Travel Authorization Request which will take you to the Travel Authorization Request page (screen shots below)
- Each request will be assigned a unique Request ID (REQ99XXXX) for tracking progress and viewing in the My Request section. Please keep track of this number for future reference
- Refer to the "?" in each section header for helpful hints

#### **Travel Request Screen – Attachments**

Use "Add Attachment" button to upload quotes, PI approvals if submitting on behalf of, your Itinerary, Reservation and Registration Information. If traveling internationally, upload the completed/approved travel forms and the Export Control form. Upload one item at a time.



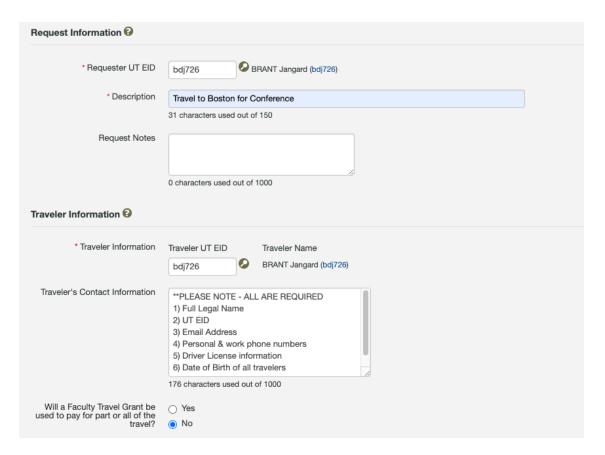
#### Travel Request Screen - Request/Travel Information

Fill in the "Request Information"

- o "Requester UT EID": This should be the EID of the person filling out the form/submitting the request
- Description/Purpose of trip must be filled in: destinations and if travel is related to a specific project.

#### Under "Traveler Information"

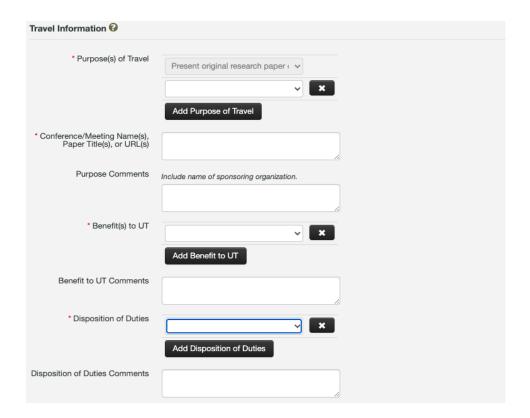
- "Traveler UT EID" is the EID of the person actually travelling. \*\*Please note that UT will not reimburse you for personal travel or the travel of your spouse.\*\*
- ALL pertinent contact information for the traveler should be put in the appropriate field
  - 1. Full legal name
  - 2. UT EID
  - 3. Email address
  - 4. Personal and work phone numbers
  - 5. Driver License information
  - 6. Date of Birth of all travelers
- Faculty Travel Grant in most cases this will be "No". If you select "Yes" as shown below it will give you a link to the
  website so you can apply if you do not already have one awarded.



### **Travel Request Screen – Travel Information**

The "Travel Information" section is used to enter details about the purpose of travel, the benefit to the university, and the disposition of the traveler's duties.

- Purpose of Travel: Use the drop-down box to select the reason for travel that best suits your travel needs. If "Other" is selected, further clarification will be needed in the "Purpose Comments" section below.
- Benefit(s) to UT: Select your reasoning from the drop down that most closely matches how you will be contributing to UT's benefit.
- <u>Disposition of Duties</u>: If any UT classes/work will be missed please indicate how these duties will be handled by classmates/coworkers. If "No classes missed" is selected please skip to the next section. If any other selections are made please list the name(s) of your colleagues who will be assisting in your absence.

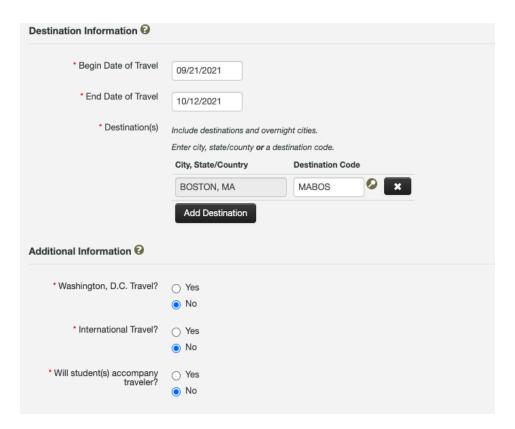


### **Travel Request Screen – Destination Information**

- The **Destination Information** section is used to enter travel begin and end dates. Use *Add Destination* to add all points of travel. UT defines a destination as any location you will be traveling that does not qualify as a "lay over" or "pass through" area. For example, if you were driving from Austin to Dallas, inputting Waco would not be necessary.
- If you have any personal dates of travel, please include these below in the *Travel Notes* section. UT does not reimburse for personal travel.
- The **Additional Information** section includes questions that pertain to the travel destination and whether or not students will accompany the traveler.
  - If Yes is selected for any of the questions, additional fields display information on the screen prompting the
    user to provide further information or contact a specific department.

#### • Additional Information

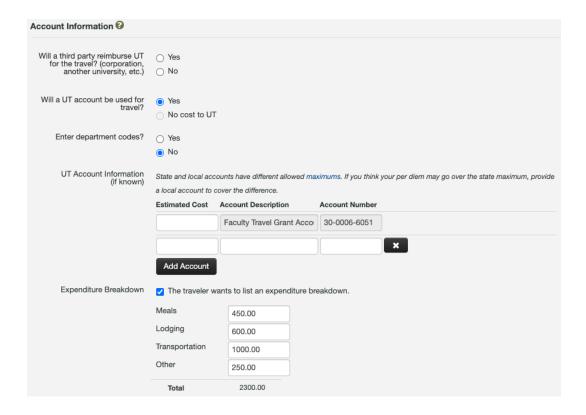
- o <u>Washington D.C. Travel:</u> If selecting "Yes" you will need to supply a purpose to the visit as well as identify who (name of individual) you are meeting/working with as well as their organization affiliation.
- International Travel: Please select this option if you are leaving the United States or its territories. When you select "Yes" it will prompt you to complete the International SOS Assistance Abroad application which is mandatory for international travel. The only exceptions to not filling out this form is if you book your travel arrangements through Anthony Travel/Concur (the UT travel management system) in which case you will be automatically entered.
- Will student(s) accompany traveler: If you are a student or students are accompanying you on your trip please select "yes" to this option. It will give you resources for Student Travel restrictions at UT.



#### **Travel Request Screen – Account Information**

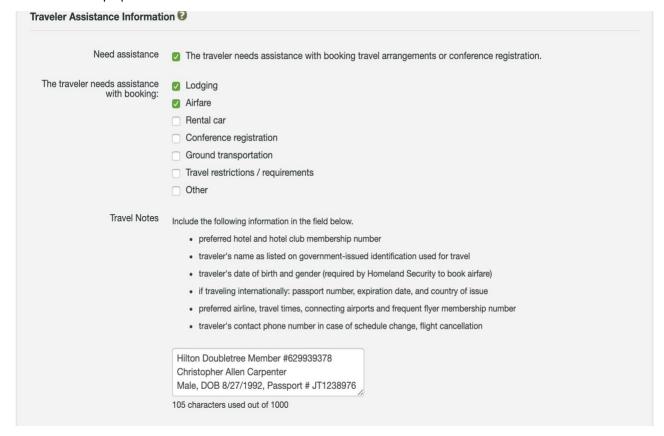
The Account Information section includes questions that pertain to how the travel is to be funded:

- Third Party Reimbursement: Select yes if a third party, non-UT account is paying for some or part of your travel.
  - If yes, a UT account number and name of the third party must be provided.
  - o If "No" then this would qualify as a "No Cost RTA"
- <u>Will a UT Account be used for Travel</u>: If UT is going to pay for any part of your travel expenses please select "yes". Even if you book through Anthony Travel/Concur and are not expecting a direct reimbursement please select "yes". If an outside entity is going to pay for your total trip expenses or you are not expecting to be reimbursed for this travel please select "No".
- <u>Department Codes</u>: Always select NO.
- <u>UT Account Information</u>: This section is used to input a UT account number to be utilized for reimbursement. Please submit an estimated cost of your trip including meals, lodging, airfare/transportation, conference registration fees or any other expenses you are expecting including taxes and fees. The "Account Description" field is the name of the account being used. Lastly, input the 10-digit account number (includes sub-account) that was provided by the professor/admin for this travel.
- Expenditure Breakdown: \*\*Optional Field\*\* You can use this option to break down where you expect to incur any expenses.



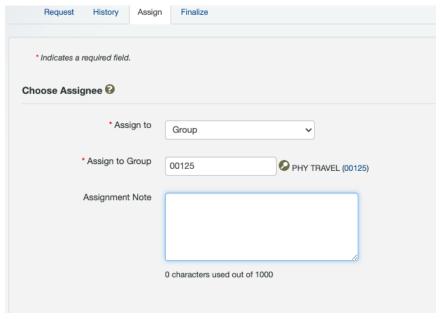
#### **Travel Request Screen - Traveler Assistance Information**

Traveler Assistance Information: Please check the box if you require assistance in booking travel, lodging, rental cars, etc. Doing this will initiate an email to the requester (not traveler) of this RTA with instructions for booking travel through the University. It is recommended all travelers book travel through this method and it will directly bill the department for these expenses causing no need for direct reimbursement. Please select this option if you do not have the means to finance a trip up front.



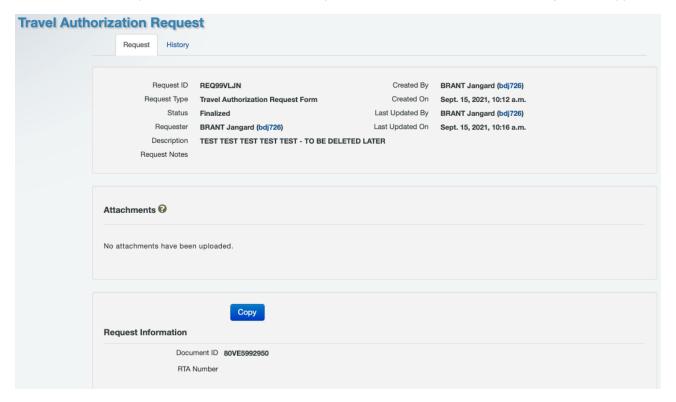
#### Travel Request Screen - Step 3: Assign the request

- Select the drop-down menu in "Assign to" and select "Group".
  - Select PY TRAVEL (00125) in the "Assign to" field. Do not select EID.
  - If you are creating a request for someone other than yourself and need them to review before sending it to the Physics Group, select EID and enter in their UT EID. This will route to them and they can submit the request if necessary.
- Assignment Note field, can be used to state urgency or any other notes you want the approver to be aware of including requesting a meeting if you have more info to share and prefer a 1x1.



### **Summary of Request**

- After you Assign your request, you will see a summary of your submission. On the "Home Screen" of the individual Purchase Request you can select History and view all of the changes of that document. Good for tracking purposes.
- Please note: the RTA Number field will populate with that information once the travel document is approved. The "Finalized" status in this request means that it has been completed here and carried over to another system for approval.



### **Request Home Screen**

#### • My Requests Inbox

o If the purchaser sends the request back to you for edits, you will see it the, see screen shot below. You select the Request ID number and to see the full list of items, select the link in the section

#### My Requests

 This section captures your history of requests.

equest ID	Description	Request Type	Creator
REQ99ZZGB	Test	Travel	Christopher A
		Authorization	Carpenter
		Request	(cac7742)
EQ990DR4		Travel	Virginia Oviedo
		Authorization	(vo736)
		Request	

## Planning a similar trip?

 Navigate to My Requests section and search your prior requests. Select it and copy to initiate a new request.

MY REQUESTS Requests created by me or for me				
Request ID	Description	Request Type	Status	
REQ990DR4		Travel Authorization Request	Created	
REQ99WRLL	Silver plated copper wire from Accu Glass	Purchase Request	In Progress	
REQ999LQJ	NACUBO F&A Long Form	Travel Authorization Request	Finalized	