

Travel Authorization Procedure

Checklist:

Supporting documents

- Meetings and conferences-Conference Agenda and Invoice/receipt with \$ amount
- Automobile Mileage- Googlemap, Mapquest (From Assigned Campus/Home (whichever is the closest) to Conference Location).
- Air Travel-Booking confirmation/Receipt with \$ amount
- Hotel/Lodging-Booking confirmation/Receipt with \$ amount
- Miscellaneous (Parking, Transportation (Ex: Lyft, Uber,Taxi), Baggage, Wifi)- Does not require supporting document until you submit Expense Report
- Meals (Breakfast \$10, Lunch \$15 & Dinner 21= Total \$46/a day (please review conference agenda if meal(s) provided. If provided, only need to submit meal(s) that is not provided. Supporting document is not required for both Travel Authorization and Expense Report
- Approval (If you receive an approval from Academic Senate)

GL String/Budget String for Accounting Details

Need Fund-Department-Product (Activity)

Account code will be provided automatically in Peoplesoft

1. Log into PeopleSoft using myportal.sdccd.edu

mySDCCD Login

By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

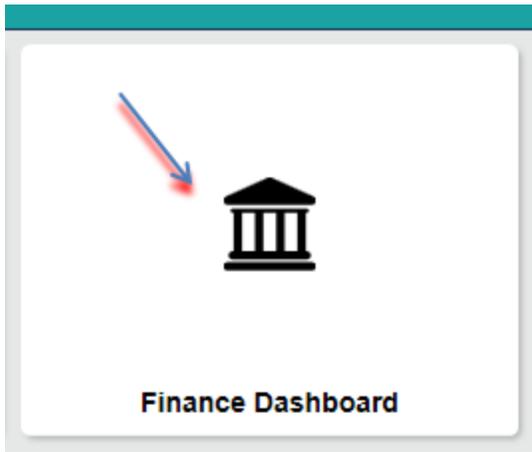
Password

[Sign In](#) [Forgot your Password?](#)

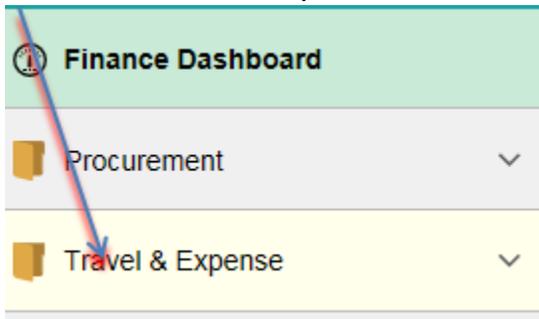
Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

[Need Assistance? Student Help | Employee Help](#)

2. Click on Finance Dashboard icon



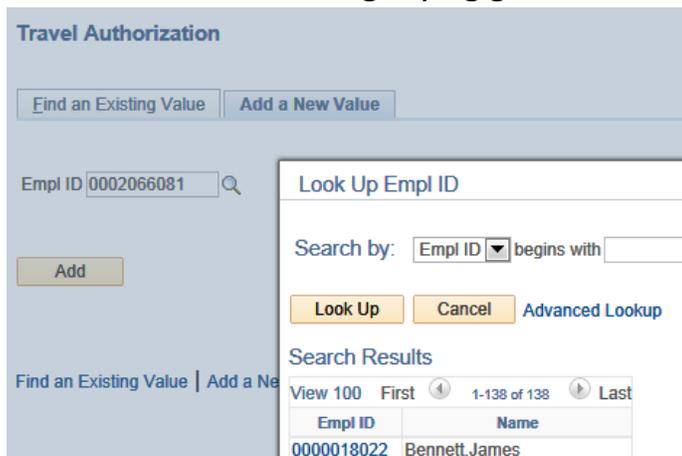
3. Click on Travel & Expense



4. Choose Travel Authorization



5. The Empl. ID field will default to your Employee ID from your PeopleSoft profile
a. You can click on the magnifying glass to search for an Empl.ID if necessary



6. Click on "Add" to choose your TA creation option.



7. Complete *Business Purpose (Choose Professional Development), Description and Date From and Date to of travel.

Create Travel Authorization

8. Enter Expense Type. Please make sure to complete boxes with * symbol

Payment Type- Employee Paid versus Prepaid

- a. Employee Paid- Employee will pay first then will be reimbursed after conference
- b. Prepaid- If the District will pay the supplier directly (If you choose this method you will need to do an additional step after TA has been approved- Please see Pre-Payment Request Instructions for procedures and timelines)

Amount box is greyed out

In order to enter an Amount on the greyed box, you will need to complete the number of nights and nightly rate. Once boxes are completed- the amount will appear on the greyed box. (Also applies to Meals and Automobile mileage)

Projected Expenses

Expand All | Collapse All

Totals (1 Line) 600.00 USD

*Date: 01/22/2019 *Expense Type: Hotel / Lodging *Description: HOTEL *Payment Type: Employee Paid *Amount: 600.00 Currency: USD

*Billing Type: Internal Dis

Number of Nights: 3 *Nightly Rate: 200.00

Accounting Details

- Accounting Details- Expand the triangle. Enter the GL String# that was provided to you to pay for your conference. Enter Fund/Dept/Product. Account code should already automatically filled in (do not change).

THE GL STRING BELOW (1110-42010-672000) IS AN EXAMPLE DO NOT USE. PLEASE ASK SUPERVISOR FOR GL STRING THAT WILL PAY FOR YOUR TRAVEL

Accounting Details

Chartfields

Amount	*GL Unit	Fund	Dept	Product	Account
164.59	CED01	1110	42010	672000	5355

*If you are using 2 or more Budget# to pay for your travel and need to split cost you can an additional Chartfield by scrolling on the right until you see the + plus sign then click the button.

Accounting Details

Chartfields

Amount	count	Oper Unit	PC Bus Unit	Project	Activity	Affiliate	Fund Affil
	155						

+ -
Add a new row at row 1 (Alt+7)

Once added you will now see multiple Chartfields and you can split the amount of the line item per GL String#.

*Date: 01/28/2019 *Expense Type: Air Travel *Description: AIRFARE *Payment Type: Employee Paid *Amount: 164.59 Currency: USD

*Billing Type: Internal Dis

Ticket Number: ABCDEF

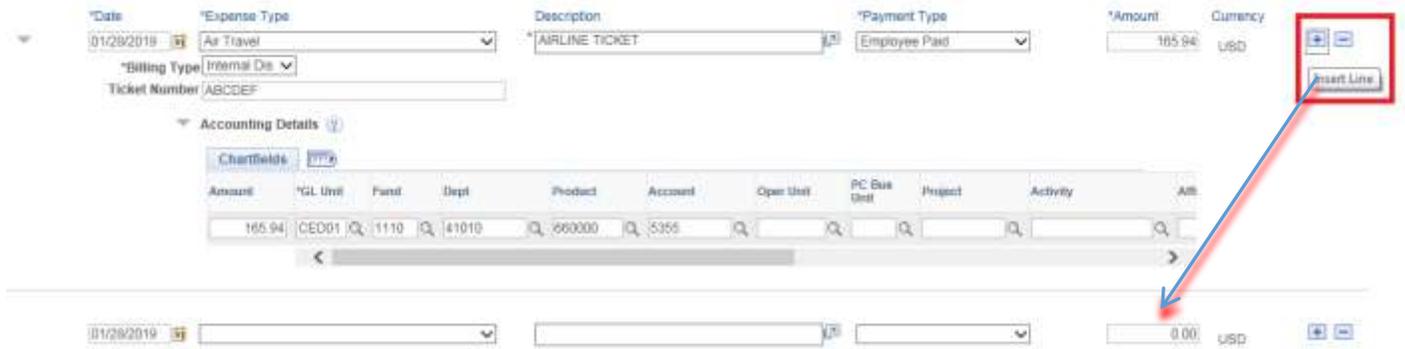
Accounting Details

Chartfields

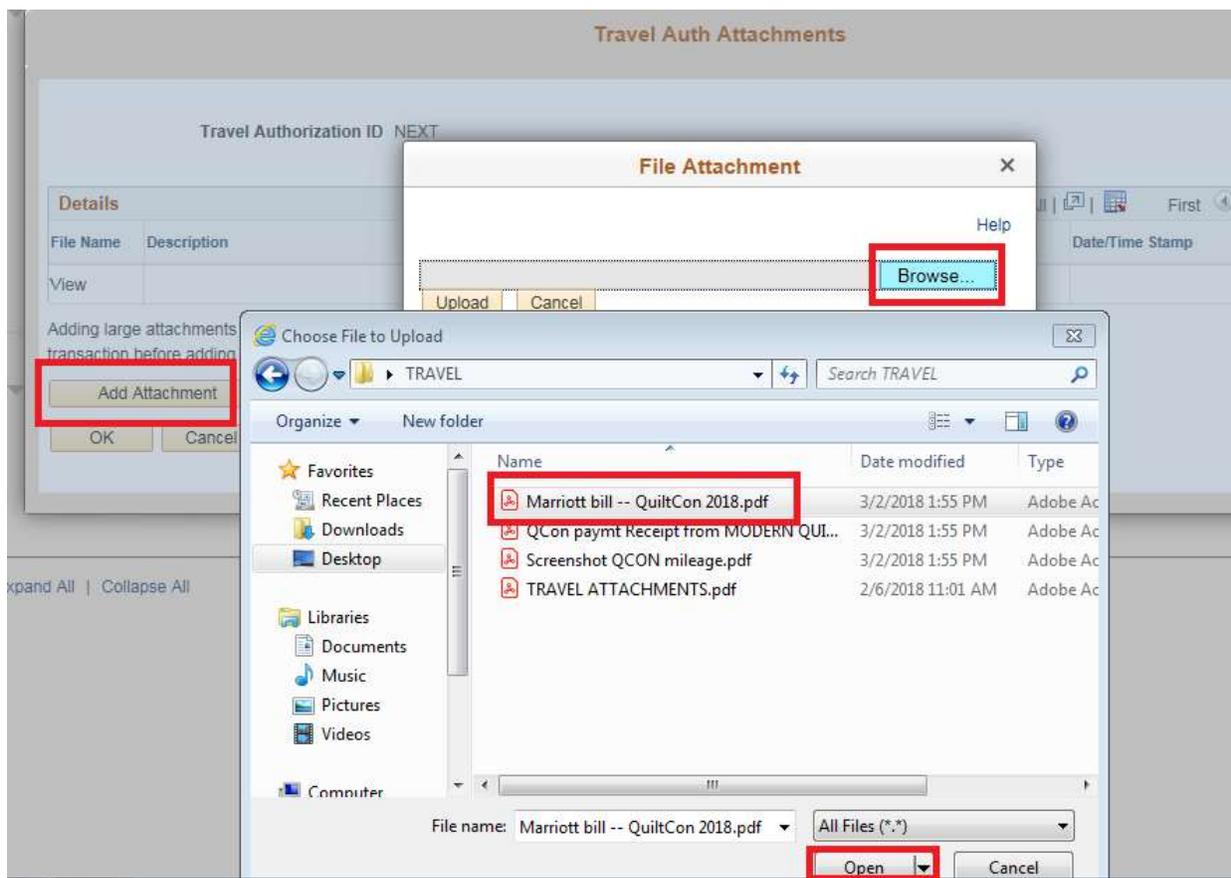
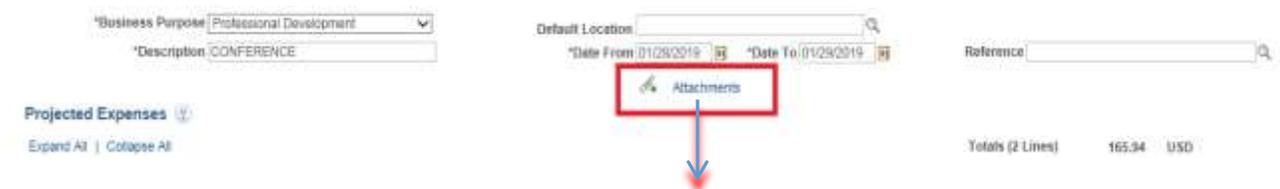
Amount	*GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project	Activity	Aff
100.00	CED01	1110	42010	672000	5355					
64.59	CED01	1110	41010	660000	5355					

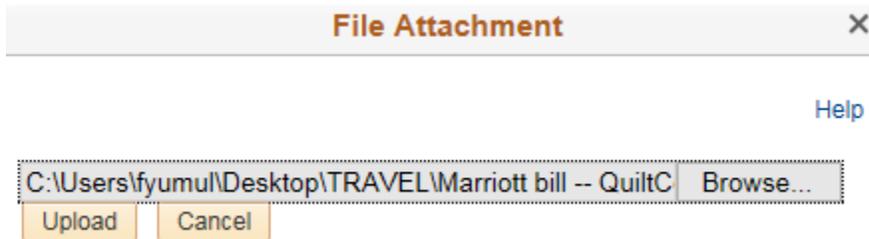
*It's best practice to hit the Save for Later button after entering an Expense Line Item to ensure work is being saved.

10. To add other Expense line item, click the + plus sign button. Complete and fill necessary information.



11. After adding all Expense line items, upload supporting documents by clicking the paperclip symbol or Attachment link. Click Add Attachment → Click Browse → Find document → Choose document then click Open button → Upload → Repeat if you have multiple documents to upload → Once all documents have been uploaded press OK button.





12. Review your line items and ensure everything is correct. Then click Summary and Submit button.



13. Click the check box. Wait until Submit Travel Authorization button turn from grey to yellow color. Then click submit.

Create Travel Authorization

Floreniza Yumul

*Business Purpose: Professional Development
 *Description: CONFERENCE

Default Location: _____
 *Date From: 01/28/2019 *Date To: 01/29/2019
 Reference: _____

Totals ? View Printable Version Notes

Projected Expenses (1 Line)	165.94 USD	Denied Expenses	0.00 USD
Total Authorized Amount		165.94 USD	

By checking this box, I certify these costs are reasonable estimates and comply with expense policy.
Submit Travel Authorization

14. Confirm that the TA was “Submitted for Approval”. Ensure status states Submission in Process/Submitted for Approval. If it states “Pending” it means it has not been submitted. Record the assigned TA# for your reference.



Please allow 7-10 business days for Approval. Approval notification will be sent out via email. Also, please check your email for revision notification. If TA is sent back for revision, please ensure to make necessary changes and resubmit to get routed for approval review.

For status update or if need assistance filling out their TA- Please contact Business Services at ext.4821 or vial email.

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