



eTRAVEL FAQs - DRAFT 1 (last updated 09-08-2010)

[Click here for storyboard image](#) that will be used, although it's not currently linked to the individual sections below.

Getting Started

- Who Can be Travelers
- Access to eTravel
- Timeline of Activity
- No Cost Travel

1. Travel Request

2. Your Trip

3. Travel Completion

- Original Receipts

Justification

Itinerary

- General Info (filling out the form)
- Lodging
- Meals & Incidental Expenses (M&IE)
- Federal Allowable Rate (FAR)
- Personal Time

Expenses

- Airfare
- Baggage
- Car Rental
- Mileage
- Taxi
- Receipts

List of Allowable/Dis-Allowable Expenses

Account / Funding

- Account Codes
- Subcodes
- Advances
- EFT

Approvals / Routing

- Required Approvals
- Printing/Submission

Payment / Reimbursement

- Account Codes
- Subcodes
- Advances
- EFT

Misc. / Other





- Multiple Travelers / Sharing Expenses
- Leave Related
- Training Request Form
- URC

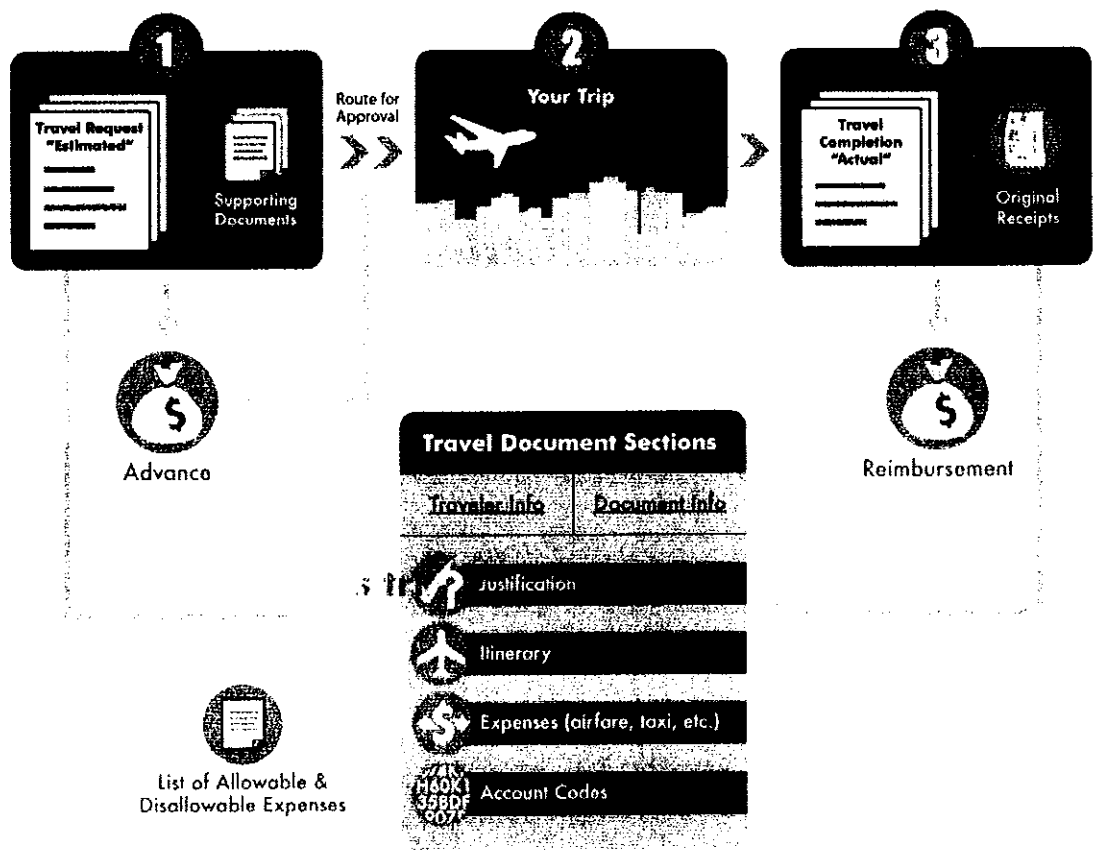
Going on a business trip?

How eTravel works



What is your role?

- 
Preparer
- 
Traveler
- 
Fiscal Officer
- 
Approving Authority





Basic Info



Access

Q: Who can be travelers in eTravel?

A: Currently only UH Employees who are in the HR PeopleSoft system.

As of Sep 2010, ITS is currently working on a mod to allow RCUH employees, Casuals, Overloads, Student Employees, and Student Non-Employees to be travelers in eTravel. Target deadline is the end of Fiscal Year 2011.

Q: Who can access eTravel?

A: Anyone with a UH username/password who has a profile in the Profiler application may login. However, what each user can do is dependent on his/her role, whether delegated to as a Preparer, or assigned to a Business Office for a fiscal role. Note, anyone with a UH username may be Preparers or be assigned to a Business Office, this includes RCUH employees, Casuals, Overloads, and Student Employees.

Q: I am a traveler but someone else does all my travel paperwork for me. Is it necessary for me to login to eTravel?

A: No, since eTravel doesn't accommodate electronic approvals at this time, it is not necessary for you to login. However, you must create a user profile in the Profiler application and assign the Preparer role to other users based on their UH username.

Q: How do I prepare a travel document for another employee when I don't see them in my list of travelers?

A: The traveler has to login to Profiler and grant you Preparer access. The reason it works this way is that the traveler's profile may contain sensitive data, so they have to specify who is allowed to see all their information. In addition, travel documents contain detailed information on when employees will be away from their homes, sometimes for extended periods. To protect the employee/traveler, travel information is restricted from public viewing and each traveler must designate who can see their trip information.



No Cost
Travel

Q: What constitutes no-cost travel?

A: This is when an employee is traveling for official UH business, but UH is not paying for the trip as it's being funded by another organization or institution.

Q: If there's no cost to the University, does a travel document still have to be submitted?

A: Yes. If the employee is traveling for official UH business, even if at no cost to the University, a Travel Request must be submitted to cover the traveler while he/she is away.

Q: Do I need to submit a travel form if the traveler was asked to attend and another UH campus is paying?

A: A Travel Request must be submitted on behalf of the traveler. Either the traveler's home department or the campus funding the travel must submit the request.



**Travel
Request**

Q: *When is a Travel Request required?*

A: Any time an employee is traveling for University business, an approved Travel Request is required to cover the traveler while he/she is away.

Q: *When should I submit my Travel Request?*

A: Prior to departure.

Q: *How much info is needed on the Request – dates and justification only, no estimated cost?*

A: If the trip is being funded by the University, estimated costs are required and prior approval must be obtained. In terms of funding, prior approval includes:

1. The Principal Investigator must authorize use of the account code to fund the travel.
2. The Fiscal Officer must authorize that adequate funds are available and fiscal policies and procedures have been followed.

The traveler risks not being reimbursed upon return if prior approval is not obtained and there are inadequate funds to cover the expenses.



Justification

Q: *What is adequate justification for the trip?*

A: Per the travel APM, official travel shall benefit the University so justification needs to be provided to demonstrate that benefit. Minimally the following should be provided:

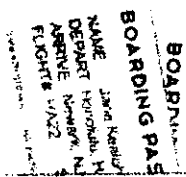
- Name of conference / workshop / seminar, etc.
- Nature of task to be performed
- Attach relevant brochures (a few pages that includes the purpose and dates of the conference or seminar are sufficient), or other documentation which provide the basis for the travel plan
- How the travel is related to the employee's duties or to the specific grant funding the travel

Q: *Are conference badges required?*

A: No.

Q: *Is it a requirement to list other travelers on the travel document if several employees are going on the trip together?*

A: It's not required but it is helpful, especially if expenses are being shared or split among other travelers. For example, in some cases one person is renting a larger car to be shared by other travelers. Cross-referencing the other travel document numbers/other travelers make it faster and simpler to audit the information and process the reimbursement.



Itinerary



General Info

Q: What is the purpose of the itinerary?

- A:**
1. To document the timeline of the trip.
 2. To calculate the number of business days and allowable Lodging and M&IE allowance based on the business destination.
 3. To know where UH travelers are when they're away for business purposes.

Q: What if the itinerary does not reflect actual traveling time?

- A:** It doesn't have to. The purpose of the itinerary is to reflect the traveler's business itinerary – which may or may not match the airline itinerary times.

Q: What is the "At Airport" field on the itinerary?

- A:** After 9-11, travelers were given additional time to be at the airport, which is included in calculating the total number of business days in quarter day segments. For inter-island trips, the traveler may claim up to 90 minutes prior to their departure time. For out-of-state travel, the traveler may claim up to 3 hours prior to departure time.

Q: How do you fill out the itinerary if the traveler drives or catches a train during the trip to different destinations?

- A:** Add additional lines/legs in the itinerary for each business destination.

Q: The traveler's flight was delayed. Do I input the scheduled or actual departure/arrival times?

- A:** On the Travel Request, input the scheduled travel times. On the Travel Completion, input the actual travel time so the traveler will be reimbursed based on what actually happened.



Account / Funding

Q: How do I know what account number to use?

- A:** Check with your Program Manager, Fiscal Officer, or the Fiscal Office responsible for approving the travel document.

Note: In eTravel, the account code is not required until the Business/Fiscal Office clicks the Approve button. This allows the document to be submitted to the Fiscal Office so they can fill in the appropriate account codes.

Q: How do I allocate costs among multiple account codes?

- A:** eTravel has 3 Accounting Methods:

1. By Percentage -- select this option to allocate costs by a percentage, for up to a maximum of 5 account codes. Example: 60% to one account, and 40% to another.
2. Fixed Amount -- select this option to allocate costs by a fixed dollar amount, for any number of account codes. Example: \$1,001.23 to one account, and \$502.77 to another.
3. Manual -- select this option to allocate costs and subcodes to a specific account code. This option requires the most work but allows the most flexibility to allocate amounts by specific subcode. Any number of account codes may be used.