I. Purpose & Overview
The purpose of this document is to provide campus users with sufficiently detailed information to complete the Travel Authorization in accordance with university policy and central administration requirements.

The Travel Authorization (TA) is completed in the application on myBoiseState to comply with state policy requiring preapproval of university-related travel, to fulfill the duty of care toward university colleagues, and to properly encumber reimbursable travel expenses for departmental budgets.

II. Procedure

1) Process Flow

Gather Travel Information → Enter Data in Application → Department Approval → Travel Encumbrance → Travel Encumbrance Reversal

2) Definitions

a) Personal Travel: Travel of a personal nature scheduled in conjunction with business travel.
b) No Cost Travel: Travel paid for by the employee or a third party. The university assumes no responsibility for costs associated with travel.
c) Application: The application available on myBoiseState to route and process Travel Authorizations.
d) Encumbrance: A budget tool used to hold funds for a purchase until it is received and payment is initiated.

3) Requirements

a) Travel Logistics: Follow department business process to gather all required travel information.
b) Travel Authorization Form Details:
   i) Traveler Information: Enter name, department, travel location, business purpose, and travel begin and end dates
      (1) All foreign travel for Official University Business must be reported to the Risk Management Insurance Office.
   ii) Personal Travel Information: Select personal travel information and upload required documentation to include business itinerary and transportation cost comparison, if applicable.
   iii) No Cost Travel Details: Select the organization/individual responsible for payment
iv) **Estimated Employee Reimbursement Amount**: Enter expense items or total travel costs related to reimbursable expenses to the employee and the Funding Source from which they should be encumbered.

v) **Estimated Prepaid Amount**: Enter expense items or total travel costs related to prepaid expenses and the Funding Source they are expected to be paid from.

vi) **Optional Documentation**: Upload documentation according to departmental business requirements.

c) **Department Approval**

i) At least one individual should approve Travel Authorizations.

ii) The number of approvers, and who they are, is specific to the Department’s business process. Best practice is to always add the traveler and the traveler’s supervisor as approvers.

iii) Up to five approvers may be added to the Travel Authorization.

d) **Travel Encumbrance**: Travel encumbrances are created when reimbursable expenses are entered on a Travel Authorization.

i) The purpose of the encumbrance is to set aside funding for expense reimbursement.

ii) Once a Travel Authorization has been approved, central administration will create an encumbrance against the requested funding source(s) for reimbursable expenses.

e) **Reversal of Travel Encumbrance**

i) **Expense Report**: The travel encumbrance will be released/reversed as part of the employee reimbursement (Expense Reports) process. This process is completed on a weekly basis by central administration.

   1) **Travel Authorization Number**: Enter the 9-digit Travel Authorization Number in the Travel Authorization Number field of the Expense Report.

   2) **Attachments**: Attach a copy of the approved Travel Authorization at the top of the Expense Report.

ii) **Request to Release Travel Encumbrance**: Requesting a Reversal is required when an Expense Report will not be submitted for the TA or the TA Number was not included on the Expense Report.

   1) Only individuals with Business Manager Access can access this function in the Travel Authorization Application.

iii) **Cancelled Travel**: When travel is cancelled, the Travel Authorization should be cancelled in the Application by editing, entering a reason, and clicking Cancel Request. Travel Authorization should only be cancelled if the trip will not occur.

4) **Supporting Documentation**

   a) **Department-Specific Documentation**: Check with your business manager for additional department documentation requirements.

   b) **Transportation Cost Comparison**: A cost comparison is required when personal travel is made in conjunction with university travel and should include multiple options with the business travel dates.

   c) **Business Travel Itinerary**: An itinerary of university-related events is required when personal travel is made in conjunction with university travel.

5) **Best Practices**

   a) Gather all supporting documentation prior to beginning Travel Authorization.

   b) Verify Department Approvers for the traveler prior to completing the TA.

   c) Verify the correct Funding Source prior to submitting the TA.

   d) The TA should be saved as a PDF to upload to an associated Expense Report.
### III. Additional References

<table>
<thead>
<tr>
<th>Source</th>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Authorization</td>
<td>Form</td>
<td>Online form to be completed prior to university sponsored travel on my.BoiseState.</td>
</tr>
<tr>
<td>Per Diem Calculator</td>
<td>Calculator</td>
<td>An excel tool used to calculate per diem rates due to traveler.</td>
</tr>
<tr>
<td>Creating and Submitting Travel Authorizations</td>
<td>Training</td>
<td>This tutorial will guide you through creating and submitting a travel authorization in the application.</td>
</tr>
<tr>
<td>Reviewing and Approving or Rejecting Travel Authorizations</td>
<td>Training</td>
<td>This tutorial will guide you through the steps of reviewing and approving or denying a TA.</td>
</tr>
<tr>
<td>Editing or Cancelling a Travel Authorization Request</td>
<td>Training</td>
<td>This tutorial will guide you through the steps of editing or canceling a submitted TA.</td>
</tr>
<tr>
<td>Reviewing Travel Authorization Status</td>
<td>Training</td>
<td>This tutorial will guide you through the steps to check the status of a TA.</td>
</tr>
</tbody>
</table>