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 online in order to comply with state law that requires preapproval of university-related travel, fulfill the duty of care toward university colleagues, and properly encumber reimbursable travel expenses for departmental budgets.

II. Procedure

1) Process Flow

2) Definitions

   a) **Personal Travel**: Travel of a personal nature scheduled in conjunction with business travel.
   b) **No Cost Travel**: Employee travel paid for by the employee or a third party. The university assumes no responsibility for costs associated with travel.
   c) **OrgSync**: Web platform used to route and process Travel Authorizations

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, employee ID, department, location, business purpose, begin and end dates, personal travel, and cost responsibility.
      ii) **Accounting Information (Encumbrance)**: complete and upload the Travel Encumbrance Worksheet to identify travel fund source and the amount to be reimbursed to the employee.
iii) **PCard Expense Estimate**: enter total travel costs to be charged to PCard, upload department-required documentation, and review travel policy.

iv) **No Cost Travel Details**: enter the organization responsible for payment, upload department required documentation, and review travel policy.

v) **Personal Travel Information**: enter personal travel information and upload any required documentation, if applicable.

vi) **Approval**: enter approver emails according to department business process.

c) **Department Approval**

i) Travel Authorizations should be approved by the fund source person and HR supervisor of the traveler.

ii) Approvals and denials should be recorded on the TA.

4) **Supporting Documentation** – List of any documents required to complete the task or transaction.

a) **Completed Travel Encumbrance Worksheet**: Access Worksheet directly in the TA form.

b) **Department-Specific Documentation**: Varies.

5) **Best Practices**

a) Gather Supporting Documentation prior to beginning Travel Authorization

b) Verify Department Approvers & Email Addresses

c) Verify the correct Funding Source prior to completing the Travel Encumbrance Worksheet

### III. Additional References

<table>
<thead>
<tr>
<th>Source</th>
<th>Link</th>
<th>Description</th>
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<tbody>
<tr>
<td>Travel Authorization</td>
<td><a href="https://orgsync.com/137343/forms/195139">https://orgsync.com/137343/forms/195139</a></td>
<td>Online form to be completed prior to university sponsored travel.</td>
</tr>
<tr>
<td>Per Diem Calculator</td>
<td><a href="https://vpfa.boisestate.edu/process/uformsdocs/perdiemcalculator.xls">https://vpfa.boisestate.edu/process/uformsdocs/perdiemcalculator.xls</a></td>
<td>An excel tool used to calculate partial per diem rates due to traveler.</td>
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<tr>
<td>Travel Encumbrance Worksheet</td>
<td><a href="https://orgsync.com/137343/files/1011174/show">https://orgsync.com/137343/files/1011174/show</a></td>
<td>Used to encumber travel costs charged to specific fund sources.</td>
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