



How to Create a Travel Authorization

This guide will show you how to create a travel authorization (TA). A TA is required as prior approval before any college-sponsored travel can occur. A TA is not required for virtual conferences where no travel occurs or for transportation mileage. First, a few tips:

- Your screen may look different than the images you see in this guide. The number of tiles you see and the options you have in menus will depend on your role at the college.
- In addition to the [Directions](#) section, you'll also find help and tips in the [Know Before You Go](#) and [Helpful Hints](#) sections.
- The [Highline ITS Help Desk](#) can help if you have problems with sign-in credentials, usernames or passwords.

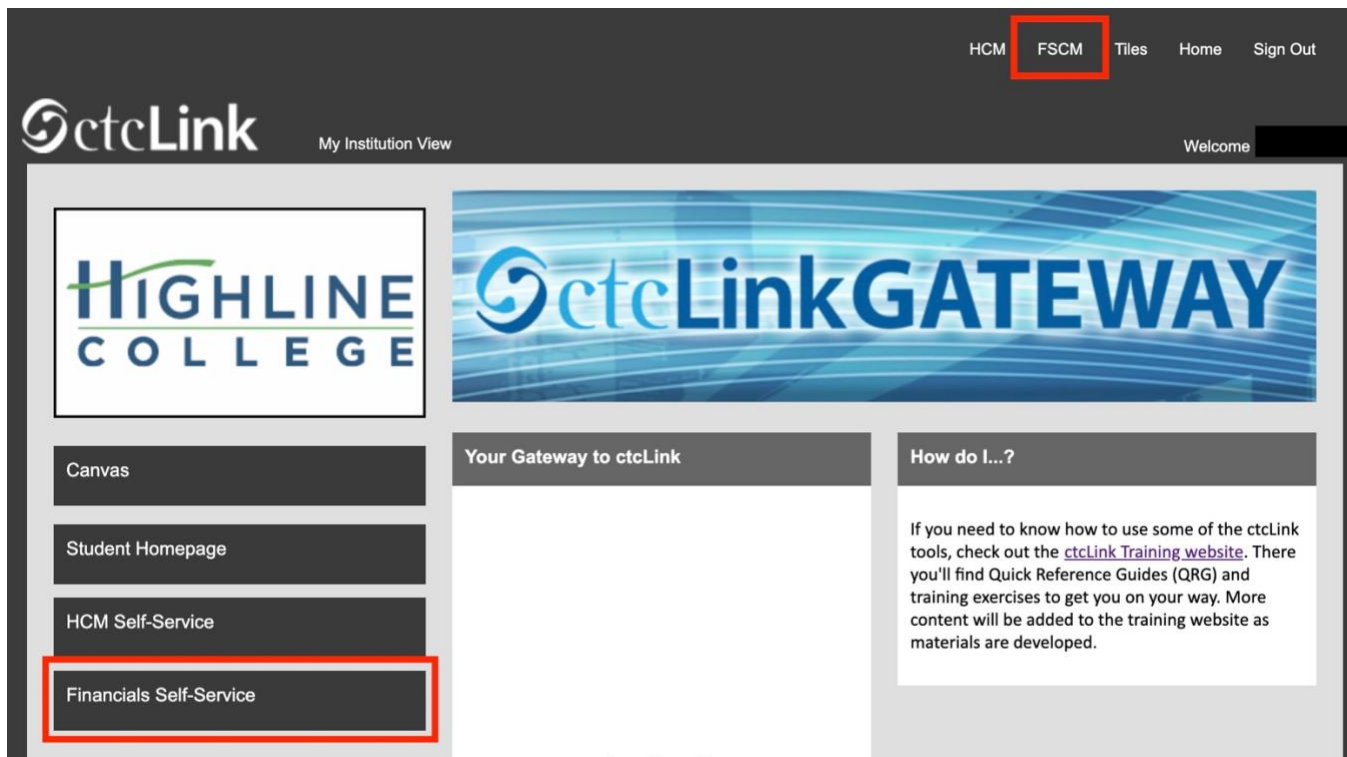
Know Before You Go

- Make sure your traveler profile is set up by contacting travel coordinator [Heather McBreen](#).
- If you plan to stay somewhere where the lodging rate exceeds per diem or you would normally not be eligible for lodging reimbursement, attach the [Maximum Lodging Exception Form](#) (signed by your supervisor or budget manager) and add as an attachment to the TA.
- If you need the travel coordinator to book airfare for you, fill out the [Advance Airfare Purchase Form](#) and attach to the TA. And, email [Heather McBreen](#) to confirm; she will work on booking your flight.
- Know your unique Authorization ID. The Authorization ID will be assigned after you submit. If you have a question or concern regarding your TA, this will be the easiest way to find it.
- Attachments are required as backup documentation. Make sure to include any booking confirmations, agendas, itineraries or other backup documentation to justify expenses/estimates. To create electronic versions, you can take a picture with your phone and email it to yourself as a JPEG or PDF.
- **Payment Type:**
 - **Employee** = You paid for it and plan to seek reimbursement (applies to those using corporate cards).
 - **PCard** = You paid using a purchase card and cannot seek reimbursement (only applies to registration; purchase cards cannot be used for travel expenses).
 - **Pre-Paid** = Either you completed a requisition for registration or the travel coordinator is booking your airfare in advance. Neither is eligible for reimbursement.
- **Billable vs. Nonbillable:**
 - **Billable** = The employee is using their own funds to purchase and will seek reimbursement.
 - **Nonbillable** = The employee did not use their own funds and is ineligible for reimbursement.
- **Default Location:**
 - If you're having trouble finding your travel location, try the nearest city. It's also handy searching for the state first (e.g., Washington).
 - You are not required to include a location. You can manually look the location up through the [General Services Administration](#) (GSA) and enter the per diem amount (just be sure to provide backup documentation as an attachment).

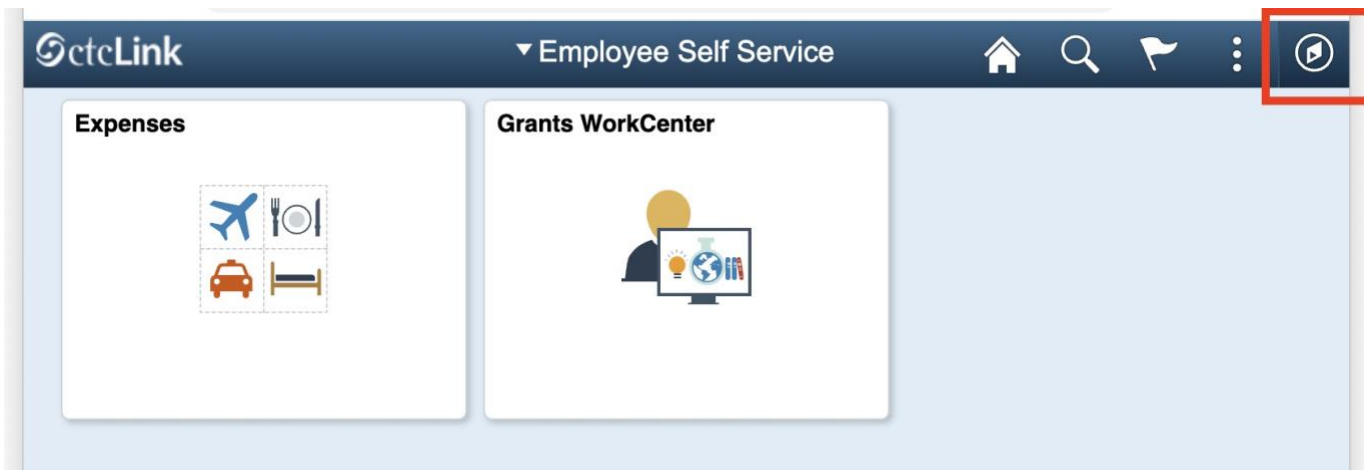
Directions

Steps 1–8 show you how to navigate to the page to begin creating or modifying a travel authorization. If you are familiar with ctclink navigation, here's the shorthand version: From the **ctclink Gateway**, click **FSCM (or Financials Self-Service)** > **NavBar** > **Navigator** > **Employee Self-Service** > **Travel and Expenses** > **Travel Authorizations** > **Create/Modify**

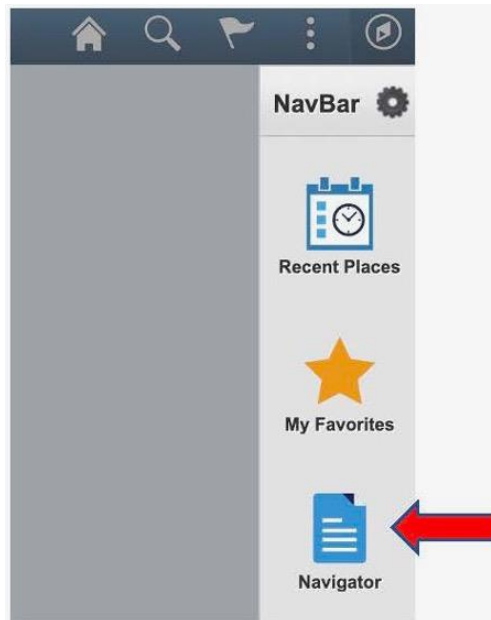
1. Log in to [ctclink](#).
2. Click **FSCM (Financial Supply Chain Management)** from the top of the window or **Financials Self-Service** on the left navigation.



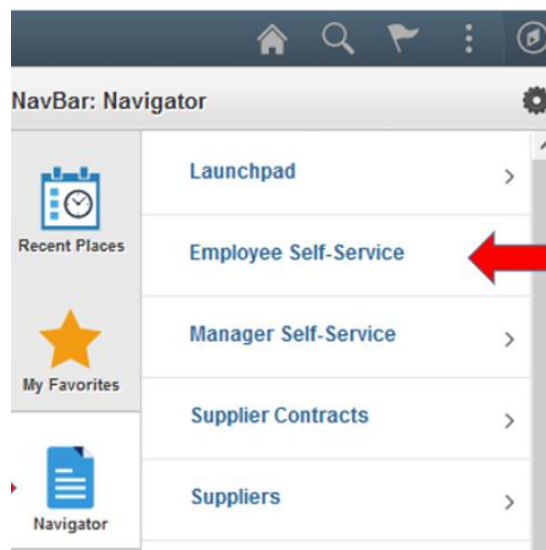
3. Click the **Navigation Bar (NavBar)** button in the top right corner — indicated by the compass icon — to view the NavBar tiles.



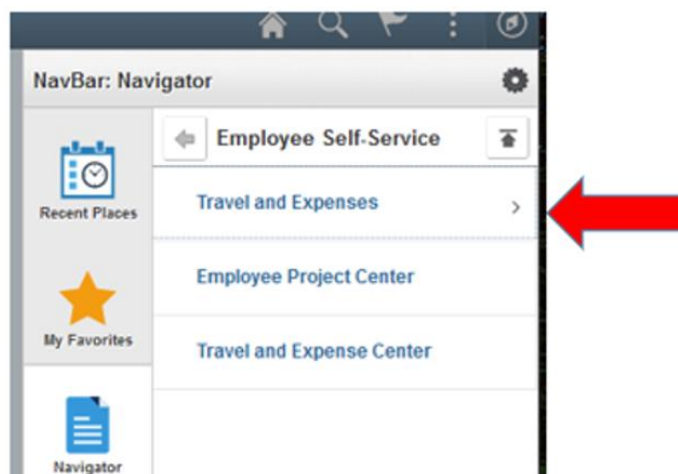
4. The **NavBar** tiles will display. Click the **Navigator** tile.



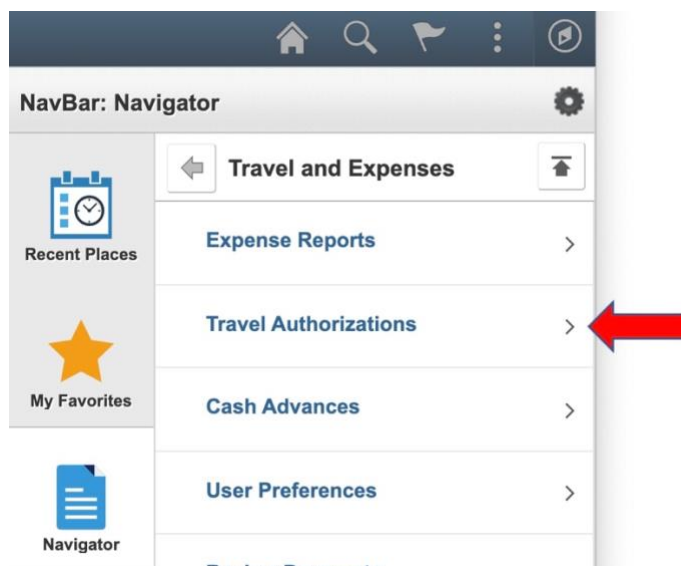
5. The **Secondary Level Content** menu will display. Click **Employee Self-Service**.



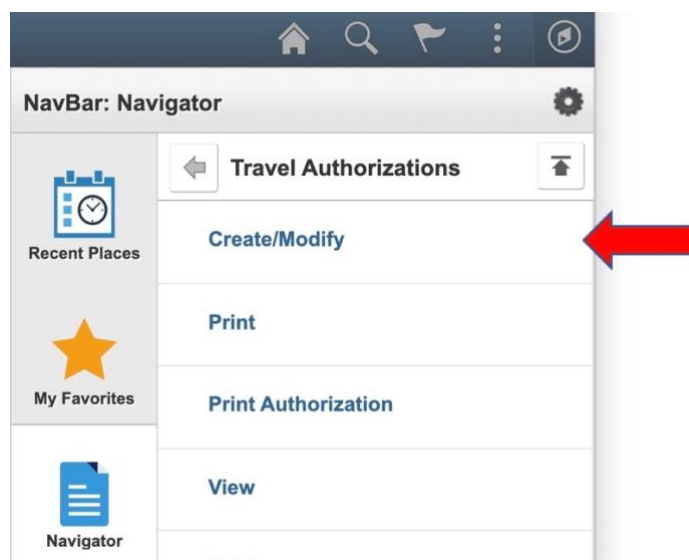
6. The **Employee Self-Service** menu will display. Click **Travel and Expenses**.



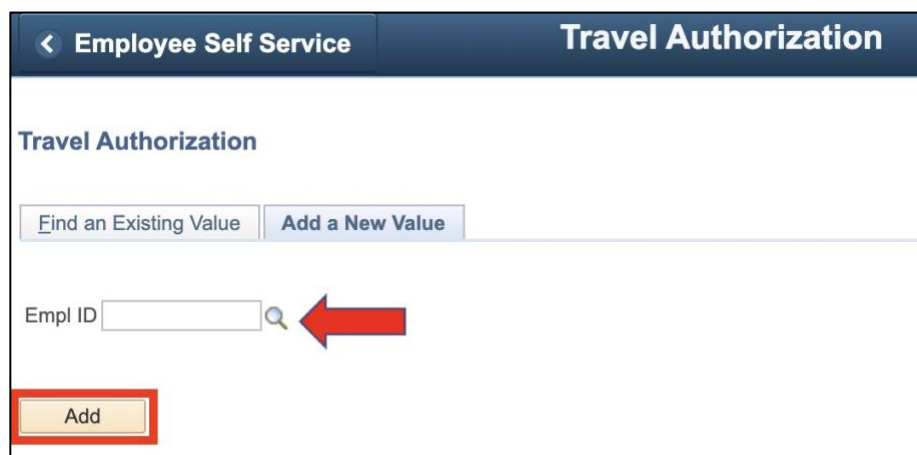
7. The **Travel and Expenses** menu will display. Click **Travel Authorizations**.



8. The **Travel Authorizations** menu will display. Click **Create/Modify**.



9. The **Travel Authorization** page will display. With the **Add a New Value** tab selected, enter your **Empl ID**, which is another name for your ctcLink ID. Click the **Add** button. (If you've previously created the TA, select the **Find an Existing Value** tab and search for it.)



10. The **Create Travel Authorization** page will display. Fill in the form header:

- **Business Purpose:** Make a selection from the drop-down menu. You can choose whatever is appropriate.
- **Description:** Be specific. Name the conference or reason for travel.
- **Default Location:** Field is not required, but helpful if all your expenses will take place in one location. Use the **Look Up** icon (magnifying glass) to see a list of locations.
- **Date From:** Enter a date or use the **Calendar Date** icon to select the first day of travel. TA must be created prior to the first day of travel.
- **Date To:** Enter a date or use the **Calendar Date** icon to select the last day of travel.
- **Reference:** Field is not required.

The screenshot shows the 'Create Travel Authorization' form header. It includes fields for Business Purpose (dropdown), Description (text), Default Location (text with magnifying glass), Date From (text with calendar icon), Date To (text with calendar icon), and Reference (text with magnifying glass). There are also buttons for 'Save for Later' and 'Summary and Submit', and a 'Quick Start' dropdown. Below the header is the 'Projected Expenses' section, which is currently empty (0 lines) and shows a table with columns for Date, Expense Type, Description, Payment Type, Amount, and Currency.

11. Fill in the **Projected Expenses** section. You will need an expense line for each item. For example, each meal will require its own line. And, each night in a hotel will require a separate line. Hotel tax will also be a separate line. While you don't have to fill out the hotel tax in the TA, it will be required for the Expense Report (ER). To add an expense line, click the **Add a New Row [+]** icon on the right side of the row. Before completing this section, see the [Helpful Hints](#) section to learn about the Quick-Fill feature.

- **Date:** Enter a date or use the **Calendar Date** icon to select a date for the line item.
- **Expenses Type:** Use the drop-down menu to select the type of expense.
- **Description:** Fill in a description of the expense.
- **Payment Type:** Use the drop-down menu to select. (See the [Know Before You Go](#) section for helpful tips.)
- **Amount:** If you've filled in the **Default Location**, the per diem — or daily expense allowance — will automatically populate for certain types of expenses such as meals and hotels. If no location is provided, you will need to provide documentation from the GSA proving the amount you've entered is within per diem. The **Amount** field will not be available for transportation mileage. (See the [Know Before You Go](#) section for helpful tips.)

The screenshot shows the 'Projected Expenses' section of the form. It features a table with columns for Date, Expense Type, Description, Payment Type, Amount, and Currency. The table currently has 0 lines. A red arrow points to the '+[-]' icon on the right side of the table, which is used to add a new row. Other red arrows point to the Date, Expense Type, Description, Payment Type, and Amount fields, indicating where to enter data for a new expense line.

12. After you've entered a line item, the **Billing Type** section will display. The fields you see — and will need to complete — will depend on what you have entered in the **Expense Type** field.

Create Travel Authorization Save for Later | Summary and Submit

Actions: Default Accounting GO

*Business Purpose:
 *Description:

Default Location:
 *Date From: *Date To: Reference:

Attachments

Projected Expenses Totals (1 Line) 0.00 USD

Expand All | Collapse All Add: Quick-Fill

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
08/10/2021	Transportation Mileage	mileage to and from airport	Employee	0.00	USD

*Billing Type: Billable
 Transportation ID:
 *Miles: x

Accounting Details

13. In this example we've entered **12** in the **Miles** field. Click the **Caret** icon (in the shape of a triangle) next to **Accounting Details** link to view budget information. Some fields will automatically populate.

Create Travel Authorization Save for Later | Summary and Submit

Actions: ...Choose an Action GO

*Business Purpose:
 *Description:

Default Location:
 *Date From: *Date To: Reference:

Attachments

Projected Expenses Totals (1 Line) 6.72 USD

Expand All | Collapse All Add: Quick-Fill

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
08/10/2021	Transportation Mileage	mileage to and from airport	Employee	6.72	USD

*Billing Type: Billable
 Transportation ID: CAR AUTO
 *Miles: 12.00 x 0.5600

Accounting Details

Amount	*GL Unit	Fund	Appropriation Index	Dept	Class	State Purpose	PC Bus Unit	Project	Activity	Program
6.72	WA090			98800		N				

14. Click the **Expand** icon next to **Chartfields** to reveal all available fields.

Create Travel Authorization Save for Later | Summary and Submit

Actions: ...Choose an Action GO

*Business Purpose:
 *Description:

Default Location:
 *Date From: *Date To: Reference:

Attachments

Projected Expenses Totals (1 Line) 6.72 USD

Expand All | Collapse All Add: Quick-Fill

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
08/10/2021	Transportation Mileage	mileage to and from airport	Employee	6.72	USD

*Billing Type: Billable
 Transportation ID: CAR AUTO
 *Miles: 12.00 x 0.5600

Accounting Details

Chartfields

Amount	*GL Unit	Fund	Appropriation Index	Dept	Class	State Purpose	PC Bus Unit	Project	Act
6.72	WA090			98800		N			

15. Fill in the following required fields if they are not yet populated. Use the **Look Up** icon (magnifying glass) to see options:

- **Fund**
- **Dept:** A number might already be entered. Verify that it is correct.
- **Class**
- **State Purpose**
- **Program**
- **Oper Unit Affil:** Highline is 7090.

Create Travel Authorization Save for Later | Summary and Submit

Actions: ...Choose an Action GO

*Business Purpose:

*Description:

Default Location:

*Date From: *Date To:

Reference:

Attachments

Projected Expenses Totals (1 Line) 6.72 USD

Expand All | Collapse All Add: | Quick-Fill

*Date: 08/10/2021 *Expense Type: Transportation Mileage *Description: mileage to and from *Payment Type: Employee *Amount: 6.72 Currency: USD

*Billing Type: Billable

Transportation ID: CAR AUTO

*Miles: 12.00 x 0.5600

Accounting Details

Amount	*GL Unit	Fund	Appropriation Index	Dept	Class	State Purpose	PC Bus Unit	Project	Activity	Program
6.72	WA090	<input type="text"/>	<input type="text"/>	98800	<input type="text"/>	N	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Subsidiary	Affiliate	Fund Affil	Oper Unit Affil
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

16. After all projected expenses have been entered, click on the **Summary and Submit** link at the top right of the page.

Employee Self Service Create Travel Authorization

New Window | Help | Personalize Page

Create Travel Authorization Save for Later | **Summary and Submit**

Quick Start: ...Populate From GO

*Business Purpose:

*Description:

Default Location:

*Date From: *Date To:

Reference:

Attachments

Projected Expenses Totals (0 Lines) 0.00 USD

Expand All | Collapse All Add: | Quick-Fill

*Date: *Expense Type: Description: *Payment Type: *Amount: 0.00 Currency: USD

Expand All | Collapse All Totals (0 Lines) 0.00 USD

Helpful Hints

Quick-Fill

- Click **Quick-Fill** to select a date range for expenses that will be repeated over several days, such as hotel and meals. This will save you a ton of time instead of having to create a new expense line for each meal and each night in a hotel. You can edit expense lines once they have been created.

The screenshot shows the 'Create Travel Authorization' form. At the top, there's a navigation bar with 'Employee Self Service' and 'Create Travel Authorization'. Below that, there are fields for 'Business Purpose', 'Description', 'Default Location', 'Date From', 'Date To', and 'Reference'. A 'Quick Start' dropdown is set to 'Populate From' with a 'GO' button. Below these fields is a 'Projected Expenses' section with 'Expand All' and 'Collapse All' options. An 'Add' button with a 'Quick-Fill' icon is highlighted with a red box. Below the 'Add' button is a table with columns for 'Date', 'Expense Type', 'Description', 'Payment Type', 'Amount', and 'Currency'. The table currently shows 'Totals (0 Lines)' with '0.00' in the 'Amount' column and 'USD' in the 'Currency' column.

- The **Quick-Fill** page will display. Follow the directions at the top.

The 'Quick-Fill' dialog box has a title bar and a main area with instructions: 'Enter the date range you want applied to the authorizations you will be adding to the report. Then choose the expense types and whether you want to add one instance of the expense type or have an entry of that expense type for each day within the date range.' Below the instructions is a 'Date Range' section with 'From' and 'To' date pickers. The 'From' date is '08/11/2021' and the 'To' date is '08/12/2021'. Below that is an 'Add Expense Types:' section with a table of expense types and checkboxes for 'One Day' and 'All Days'.

One Day	All Days	Expense Type
<input type="checkbox"/>	<input type="checkbox"/>	Airline in State of WA
<input type="checkbox"/>	<input type="checkbox"/>	Airline International
<input type="checkbox"/>	<input type="checkbox"/>	Airline outside State of WA
<input type="checkbox"/>	<input type="checkbox"/>	Automobile Rental
<input type="checkbox"/>	<input type="checkbox"/>	Communication Miscellaneous
<input type="checkbox"/>	<input type="checkbox"/>	Hotel in State of WA
<input type="checkbox"/>	<input type="checkbox"/>	Hotel International
<input type="checkbox"/>	<input type="checkbox"/>	Hotel outside State of WA
<input type="checkbox"/>	<input type="checkbox"/>	Hotel Room Tax (IN STATE)
<input type="checkbox"/>	<input type="checkbox"/>	Hotel Room Tax (out of State)

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Frequently Asked Questions

Do I need a new expense line for every night in a hotel and every meal?

Yes. This will make it easy and quick for you to create the Expense Report (ER) when you return. See [Quick-Fill](#) above for tips. Think of this as doing most of the work in the front half of the process.

Do my expense estimates need to be exact? Can I still be reimbursed for amounts above the estimate?

This is just an estimate, so no, expenses do not have to be exact. Yes, you can be reimbursed for amounts that exceed the estimate within reason.

What do I do about hotel tax?

You do not need to include hotel tax in your TA, but it will be required in your ER. Tax can either be a single expense line or a new expense line for each night in the hotel. See [Quick-Fill](#) above for tips on adding a range of dates to an expense type.

What if a purchase card was used for registration? Do I need to include it in the TA?

This is optional. You can include if you would like, but be sure to mark it as nonbillable and use PCard as the payment method so that we know it is a nonreimbursable expense. This is a business practice that may vary by department, so check with the budget manager to see what they prefer.
