



Supplemental Travel Authorization Job Aid

The purpose of this job aid is to explain how to submit a Supplemental Travel Authorization.

This form should be used for the following cases:

- Travel Authorization was not final approved in UTShare prior to the first day of travel.
- Travel Authorization was not created in UTShare prior to first day of travel.
- Change in travel dates of two (2) or more calendar days.
- Change to destination/location.
- Change in an approved Travel Authorization encumbrance.

Note: This process will be used in lieu of submitting a BA Exception Tracker request.

The Supplemental Travel Authorization form number must be noted in the Comments of the Expense Report for the trip.

Steps to Submit a Supplemental Travel Authorization:

1. Navigate to the Supplemental Travel Authorization SharePoint site at <https://mavsuta.sharepoint.com/sites/forms/baet/travel> and login using your employee email and NetID password.
2. Click the link “Create new Supplemental Travel Authorization” to begin the form.
3. Select the reason for submitting the request. Multiple reasons can be select if appropriate.
4. In “Section 1 – Traveler”, enter the Traveler’s information.
 - a. The form will auto-populate the Name, Employee ID, Email, and Phone of the employee completing the form. If this is correct, continue to step 5 below.

If the form is being completed on someone’s behalf, either manually enter their Name, Employee ID, Email, and Phone, or click the “Search for Traveler Info” button to search for them and populate their information.
 - b. Select the Department. This should reflect the Department in which the traveler is employee.
 - c. Select the appropriate Traveler Type.

Section 1 - Traveler

*Traveler Name: a	*Department: b
<input type="text" value="Maverick, Sam"/>	<input type="text" value="Business Affairs Support (123456)"/>
<input type="button" value="Search for Traveler Info"/>	<i>Note: The user approving as Supervisor/Department Head must be a different person than the Traveler. If a department chair is traveling, please select the dean's office as the department.</i>
*Employee ID:	
<input type="text" value="1234567890"/>	
*Traveler Email:	*Phone:
<input type="text" value="sam.maverick@uta.edu"/>	<input type="text" value="+1 817-272-2155"/>
*Traveler Type: c	Prepared by Jane Dolan, jane.dolan@uta.edu
<input type="text" value="Employee"/>	

5. In "Section 2 – Trip Information" enter the information for the trip.
 - a. If there is a Travel Authorization in UTShare for the trip, enter the Travel Authorization Document ID. This would be the Travel Authorization that need to be amended.
 - b. Enter the Business Purpose for the trip. This be the detailed reason that includes specific information such as the research project information or conference title.
 - c. Enter the Original Departure and Return Dates. If the request is to amend the trip dates, enter the Amended Departure and Return Dates.
 - d. Enter the Original Destination City, State, and Country. If the request is to amend the trip location, enter the Amended Destination City, State, and Country
 - e. If the Dates or Location are changing, enter a comment regarding the cause of the change.

Section 2 - Trip Information

UT Share Travel Authorization Document ID: a

*Business Purpose: b

	Departure	Return
*Original Dates	<input style="width: 60px;" type="text" value="4/1/2021"/>	<input style="width: 60px;" type="text" value="4/3/2021"/>
Amended Dates	<input style="width: 60px;" type="text" value="4/15/2021"/>	<input style="width: 60px;" type="text" value="4/18/2021"/>

City **State** **Country**

d *Original Destination	<input style="width: 100%;" type="text" value="San Diego"/>	<input style="width: 100%;" type="text" value="California"/>	<input style="width: 100%;" type="text" value="USA"/>
Amended Destination	<input style="width: 100%;" type="text" value="Santa Barbara"/>	<input style="width: 100%;" type="text" value="California"/>	<input style="width: 100%;" type="text" value="USA"/>

Comments: e

6. In “Section 3 – Accounting Detail”, enter the encumbrance and cost center or project information.
 - a. If the request is being made to release the encumbrance of the existing Travel Authorization, click the radio button for Release Encumbrance and move to step 6c.
 - b. If the request is to change the encumbrance of the existing Travel Authorization, click the Correct Encumbrance radio button. A field will populate asking for the Amended Encumbrance amount; enter the amount that is being requested as the trip encumbrance.
 - c. The Department selected above will populate as the Department Number.
 - d. Enter the Fund, Function, Cost Center, and or Project that is funding the trip expenses.
 - e. If the trip is being funded by a Project and approval from the Principle Investigator is required, click the radio button for Yes.

Section 3 - Accounting Detail

a Release Encumbrance
b Correct Encumbrance
 Amended Encumbrance: \$1,500.00

c Department Number: 123456 - Business Affairs Support

*Fund: 9999 *Function: 111

d Cost Center: 123456 Project Number:

e *Is Travel Authorization approval from Principal Investigator required?
 Yes No

Please specify a Principal Investigator *from UTA**:
 If name shown above does not resolve (it should underline), please delete and specify PI's email address below:

PI name fields will only populate if select "Yes" for PI approval.

Amended Encumbrance field will only populate if select to Correct Encumbrance

** Only UTA faculty and staff have access to this site and can approve.*

7. In “Section 4 – Travel Authorization not fully approved in UT Share or not created in UT Share”, if the request is being submitted because the Travel Authorization was not fully approved in UTShare prior to the start date of the trip, enter the justification for the late approval.

Section 4 - Travel Authorization not fully approved in UT Share or not created in UT Share

*Justification:
 Supervisor was on leave and unable to approve TA prior to trip

8. Submit the form for approval:
 - a. If the form is being completed on behalf of a traveler, click the “Send to Traveler” button to submit the request for the Traveler’s review and response.

Section 4 - Travel Authorization not fully approved in UT Share or not created in UT Share


*Justification:
 Supervisor was on leave and unable to approve TA prior to trip

Send to Traveler

- b. If the form is being completed for yourself, click the “Submit for Approval” button to route the form for Department Approval.

Section 5 - Certification of Travel - All Signatures Required

Traveler: Maverick, Sam



9. “Section 5 - Certification of Travel - All Signatures Required” will display the responses that have been obtained on the form.

Section 5 - Certification of Travel - All Signatures Required

Traveler: Sam Maverick
.Submitted by smaverick@uta.edu at 2021-03-26T16:15:04

Supervisor/Department Head: Dolan, Jane ; Nedderman, Blaze

Comment:

Approved by janedolan@uta.edu at 2021-03-26T16:15:07

Principal Investigator: Davis, Trinity

Comment:

Approved by trinity.davis@uta.edu at 2021-03-26T16:16:08

10. Once the form has been fully approved, it will be received and processed by the Travel Services Department.
11. If Travel Services has a question, they will return the form with their question in “Section 6 – Travel Office Processing”. Complete the “Requestor Response” field and submit the response, including an attachment if necessary.

Section 6 - Travel Office Processing

Process Status:
Return with Question

Insert Q&A Section

Travel Office Comments, Questions: Please make correction

Click here to attach a file

Returned with a Question by randallp@uta.edu at 2021-03-29T16:34:25

Requestor Response: corrected information attached


TEST ATTACHMENT.pdf
48.68 KB

Submit Response Exit

Process Comments:

Exit

12. The list of Submitted Supplemental Travel Authorizations on the homepage of the SharePoint site will display the Request status.

 Procurement & Payment - Disbursements ☆ Not following

Disbursements Home

Create a new Supplement...

Suppl Travel Auth Requests

Supporting Lists

Supplemental Travel Authorizations - Submitted [See all](#)

Request Num	Request Status	Department	Traveler Name
STA-56	Processing Pending	Business Affairs Support (123456)	Maverick, Sam
STA-57	Processed	Business Affairs Support (123456)	Nedderman, Blaze
STA-58	Return with Question	Business Affairs Support (123456)	Dolan, Jane
STA-59	Approval Pending - Dept Head	Business Affairs Support (123456)	Davis, Trinity

The Supplemental Travel Authorization (STA) request is available on this site. Workflow sends emails as needed to traveler, department head, PI approver, and travel office staff. Please report any issues to SharePointSupport@uta.edu.

Supplemental Travel Authorization:

This form/process is intended to correct/update travel requests in UT Share. Please complete this form if you would like to

- change travel dates by 2 or