Travel Authorization Requests
Domestic Travel

A TA must be submitted at least 5 business days prior to any work-related travel. TAs must also be completed for non-UF employees whose travel-related expenses will be paid for or reimbursed by UF, including visitors and faculty candidates. If multiple employees are traveling, an individual authorization must be submitted for every employee that will incur any type of expense. If only one employee will incur expenses then one form will need to be submitted, but every traveler must be noted on the form.

UF has negotiated a contract with World Travel Services, the world’s third largest travel management company located in Knoxville, Tennessee. This service is available for both business and personal travel (per traveler fees incur if arrangements include airfare or when using a travel agent for booking). Travelers have the option of requesting the Fiscal team book arrangements through World Travel for business travel, which could incur up to a $17.00 fee per traveler per trip. If World Travel is not being utilized, creating a profile can be skipped.

Creating a Profile
Access the Concur Travel online booking tool.

- Log in using your UF email and temporary password Welcome1. If you have trouble logging in initially, please let Carrie Pons or Tami Ford know.
- Create your profile to include your personal information, flight/hotel preferences, reward programs, etc.
- Add Tami Ford tford@ufl.edu & Carrie Pons cpons@ufl.edu as Travel Arrangers/Assistants in your profile. This allows them to access your information when booking business travel.

Completing a TA
Download the Travel Authorization Form – Domestic Travel (found on the department website).

Traveler section:
- If the department/fiscal staff will be purchasing airline tickets on the traveler’s behalf, the traveler’s full legal name and birth date must be provided as listed on their government issued identification (i.e. passport or driver’s license).
- Providing the cell phone number is encouraged for all travelers who are requesting the fiscal staff make their travel arrangements. This will ensure any changes (such as last minute flight cancellations) are communicated directly to the traveler in a timely manner.

Trip Details section:
• If specific preferred flights have been identified, check the “My selected flight itinerary is attached” box and attach a screen shot (from the online booking tool) of the desired flight itinerary to the TA.

• If no specific flights have been identified, check the “Please select my flight itinerary” box and indicate preferred times and airline preference. Times can be general if no specific itinerary is needed.

• Airline Preference and associated Frequent Flyer number can be provided if desired or not already linked to traveler’s profile.

Access the Concur Travel online booking tool if using World Travel to search for flight, hotel, and rental car arrangement options.

Estimated Expenses section:

• Estimates for all anticipated expenses should be listed here. Note these are estimates; they should be as close as possible to the anticipated expenses but will not need to match final expenses exactly.

• Check the corresponding boxes for any travel arrangements you would like to be made by the fiscal team and add any additional details in the Notes/Comments box. Check the corresponding box if requesting booking through World Travel.

• For lodging, the U.S. General Services Administration (GSA) rate for the travel destination must be obtained and entered on the TA. GSA rates can be obtained on the GSA Per Diem Rates website. If the traveler’s intended hotel rate is higher than the provided GSA rate, a brief explanation and associated documentation justifying the higher cost must be provided.
  
  o For example: conference/workshop is occurring at a specific hotel; a separate event – such as a sporting or music event – is occurring in the traveler’s destination and causing higher hotel rates (a screenshot of the event information needs to be provided as verification).
  
  o Be sure to include estimated taxes and fees with lodging rate to ensure accurate estimate total of expense is being approved
  
  o If lodging needs to be booked under a group rate, include the code in the Notes/Comments section of TA Form.

• Enterprise & National are the UF contracted vendor for rental cars. (Rates can be found on the department website). Rental of cars larger than Compact must include a justification for the larger vehicle in the Notes/Comments section.
  
  o If requesting a specific pickup & drop-off location and times, please include this
Authorization section:
- Make sure the form is signed and dated by both the traveler and the Principal Investigator (or Budgetary Authority) of the funding source.

Submitting the TA
Submit the completed Requisition Form to the HOP share drive

After Submitting the TA
1. The fiscal staff will verify the funding source and PI approval.
2. Once fiscally approved, the TA will be processed in the UF system by the Fiscal team.
3. Travel arrangements will be made as requested by the Fiscal team. Travel confirmation emails will be forwarded to the traveler within 5 business days of TA submission from the Fiscal email account Hobi-Fiscal@ufl.edu
4. If lodging is being paid by a department PCard, the traveler will receive a Credit Card Authorization form 5 business days prior to travel start date.

Additional Information about Travel Authorizations
Trips involving Multiple Employees
- Individual TAs must be submitted for each traveler who will incur expenses (including meal reimbursements!).
- If only one employee will incur expenses, then submit one TA for that employee, noting the names of the other, non-expense incurring travelers.

Travel Authorizations for Non-UF Employees: UFID numbers
- If the traveler is not a UF employee, a UFID must be requested for them before travel arrangements can be made.
- To obtain a UFID, email the HR Liaison, Cherrie Bell (cmbell@ufl.edu), with the following information:
  - Non-UF employee’s full legal name (as appears on government-issued ID)
  - Non-UF employee’s date of birth
  - Non-UF employee’s home address
- Cherrie will provide you with a UFID for the traveler, which will need to be listed on the TA form.

After Travel is Complete
For all business travel, a Travel Expense Report (TER) must be submitted within 5 business of the trip end date. Please see the TER procedures for guidance on completing a TER.

1. http://health---outcomes---policy.ufl.edu/about/faculty---and---staff/employee---policies/forms/
2. http://www.gsa.gov/portal/content/104877
3. http://health---outcomes---policy.ufl.edu/about/faculty---and---staff/employee---policies/forms/
4. V:\GROUP\Requisition_TA---TER_Receipts\1.New