

1. Purpose

- a. Effective August 3, 2017: In an effort to reduce processing time and improve overall efficiency, departments/programs will no longer submit original UH eTravel receipts/documentation to the Fiscal Office (except where noted in these procedures). After attaching receipts/documentation to the online UH eTravel documents, departments/programs will maintain the originals in their files for a period of one year. Thereafter, the original documents may be shredded.

2. Applicability

- a. These procedures apply to all UH and RCUH employee travel charging a Tuition (2xxxxxx), RTRF (3xxxxxx), or any combination of Tuition/RTRF with Private (4xxxxxx) or Federal (6xxxxxx) accounts via the [UH eTravel System](#) (UH employees) or [manual UH Travel DISB-4 Form](#) (RCUH employees). Reference UH APM [A8.851](#).
- b. These procedures do not apply to the following:
 - i. RCUH Cost Travel via the RCUH Financial system. Reference RCUH P&P [2.601](#) and [2.603](#).
 - ii. Non-Employee travel. Reference [JABSOM Internal Non-Employee Travel Procedures](#).
 - iii. No-Cost Travel. Reference [JABSOM Internal No-Cost Travel Procedures](#).
 - iv. Personal time off (e.g. vacation). Reference UH APM [A9.380](#) and RCUH P&P [3.620](#).

3. Definitions

- a. Cost Travel: Authorized travel whereby partial or all expenses are paid for by UH, e.g. M&IE, airfare, lodging, car rental, taxi, shuttle, parking, mileage, baggage fees, internet fees, etc.

4. Liability

- a. In accordance with Chapter 386, HRS (Hawai'i Workers' Compensation Law) and HAR Title 12, Chapter 10 (Workers Compensation), UH and RCUH employees who are traveling on official business with approved travel documentation on file will be covered should an incident occur while on the trip.
- b. UH and RCUH employees who are traveling without approved travel documentation on file will not be covered by Workers' Compensation should an incident occur while on the trip.
- c. Incidents that occur during the employee's personal time on the trip will not be covered.

5. Responsibilities

- a. Traveler:
 - i. Inform supervisor and department staff of intent to travel on official business at a cost to UH in a timely manner before departure date.
 - ii. Ensure Travel Request is completed, approved within the department, and submitted to the Fiscal Administrator at least 15 business days prior to departure.
 - iii. Ensure Travel Completion is completed, approved within the department, and submitted to the Fiscal Administrator at least 7 business days upon return.
 - iv. Assist in preparing and providing documentation as requested.
 - v. Prepare delegated signing authority memorandum to cover dates of travel, if applicable. Send a copy of memorandum to Office of Central Fiscal and Human Resources, and other offices as needed.
- b. Department/Program Staff:
 - i. Prepare Travel Request and Travel Completion documentation as requested.
 - ii. Obtain appropriate approvals on the travel documents.
 - iii. For online UH eTravel Only: Ensure all supporting documentation is scanned and attached to the online travel document. Ensure all scans are legible and accurate.
 - iv. For online UH eTravel Only: File and retain original travel documentation in department's/program's file for a period of one year. Thereafter, the original travel documentation may be shredded.
- c. Supervisor (e.g. Approving Authority or Principal Investigator) and Department Chair:
 - i. Ensure completeness and accuracy of information provided on Travel Request and Travel Completion documentation.
 - ii. Review and approve all Travel Requests and Travel Completions for employees under their supervision.
- d. Executive Authority:
 - i. Review and approve all out-of-state Travel Requests for employees within their unit. See approval chart in Section 6.a. for hierarchy.
- e. Fiscal Administrator:
 - i. Review and approve all Travel Requests and Travel Completions.

6. Approvals

- a. UH APM A8.851.C.b Authorization of Travel Request, Advance and Completion: Required travel approvals depending on travel and document type are listed below:

Type of Travel	Travel Request	Travel Completion
Intra-State	1. Traveler 2. Traveler’s Supervisor / Approving Authority / Principal Investigator 3. Department Chair (JABSOM Internal Requirement) 4. Fiscal Administrator	1. Traveler 2. Traveler’s Supervisor / Approving Authority / Principal Investigator 3. Department Chair (only when travel dates change) 4. Fiscal Administrator
Out-of-State	1. Traveler 2. Traveler’s Supervisor / Approving Authority / Principal Investigator 3. Department Chair (JABSOM Internal Requirement) 4. Executive Authority (Dean) 5. Fiscal Administrator	1. Traveler 2. Traveler’s Supervisor / Approving Authority / Principal Investigator 3. Department Chair (only when travel dates change) 4. Fiscal Administrator

7. Procedures

- a. Travel Request
- i. Complete appropriate Travel Request form. Follow the appropriate form’s instructions and the applicable travel policies. Manuals and other useful information are available on the following website: <http://blog.hawaii.edu/ofaa/travel/training/>

Employee Type	Fund Type	Use
UH	<ul style="list-style-type: none"> Tuition (2xxxxxx) RTRF (3xxxxxx) Any combination of the above with Private (4xxxxxx) or Federal (6xxxxxx) 	Online eTravel
RCUH	<ul style="list-style-type: none"> Tuition (2xxxxxx) RTRF (3xxxxxx) Any combination of the above with Private (4xxxxxx) or Federal (6xxxxxx) 	Manual DISB-4 Travel Form

- ii. Note employee’s personal time, if any, and coverage of administrative/teaching duties, if applicable, in the justification/description section.
 - iii. UH Employee eTravel Requests: Scan and electronically attach all applicable supporting documentation to the online eTravel Request Form. UH eTravel Requests shall route electronically to Traveler, Supervisor, and Account Supervisor/PI. Ad hoc add? Department Chair (if not Supervisor). Thereafter, document will route electronically to Executive Authority (Dean) and Fiscal Administrator. Fiscal Administrators will be notified via system-generated emails or check their action lists daily for documents pending their approval.
 - 1. File and retain approved eTravel Request and original documentation, including original lodging receipt, in department’s file for one year. Do not send to the Fiscal Office. After one year, original documentation may be shredded.
 - iv. RCUH Employee Manual DISB-4 Travel Requests: Attach all applicable supporting documentation behind the DISB-4 Form. The DISB-4 Form shall be printed out and manually routed to Traveler, Supervisor/Approving Authority/PI, and Department Chair (if not Supervisor) for hard copy signature approvals. Submit original DISB-4 Form and all original supporting documentation to the Fiscal Administrator for processing. The Fiscal Administrator will obtain Executive Authority (Dean) approval.
- b. Travel Completion
- i. Complete appropriate Travel Completion form. Follow the appropriate form’s instructions and the applicable travel policies. Manuals and other useful information are available on the following website: <http://blog.hawaii.edu/ofaa/travel/training/>

Employee Type	Fund Type	Use
UH	<ul style="list-style-type: none"> • Tuition (2xxxxxx) • RTRF (3xxxxxx) • Any combination of the above with Private (4xxxxxx) or Federal (6xxxxxx) 	Online eTravel
RCUH	<ul style="list-style-type: none"> • Tuition (2xxxxxx) • RTRF (3xxxxxx) • Any combination of the above with Private (4xxxxxx) or Federal (6xxxxxx) 	Manual DISB-4 Travel Form

- ii. UH Employee eTravel Completions: Scan and electronically attach all applicable supporting documentation to the online eTravel Completion Form. UH eTravel Completions shall route electronically to Traveler, Supervisor, and Account Supervisor/PI. Ad hoc add? Department Chair (if not Supervisor and if travel dates changed). Thereafter, document will route electronically to Fiscal Administrator. Fiscal Administrators will be notified via system-generated emails or check their action lists daily for documents pending their approval.
 1. File and retain approved eTravel Completion and original documentation, including original lodging receipt, in department's file for one year. Do not send to the Fiscal Office. After one year, original documentation may be shredded.
- iii. RCUH Employee Manual DISB-4 Travel Completions: Attach all applicable supporting documentation behind the DISB-4 Form. The DISB-4 Form shall be printed out and manually routed to Traveler, Supervisor/Approving Authority/PI, and Department Chair (if not Supervisor and if travel dates changed) for hard copy signature approvals. Submit original DISB-4 Form and all original supporting documentation to the Fiscal Administrator for processing.

8. References

- a. [Hawai'i Revised Statutes Chapter 489E Uniform Electronic Transactions Act](#)
- b. [State of Hawai'i General Records Schedule](#)
- c. [Executive Policy EP 2.214: Security and Protection of Sensitive Information](#)
- d. [Executive Policy EP 2.216: Institutional Records Management and Electronic Approvals/Signatures](#)
- e. [Administrative Procedure 8.450: Records Management Guidelines and Procedures](#)
- f. [Administrative Procedure 8.926: Administrative and Financial Management Requirements for Extramurally Financed Research and Training Programs / Activities of the University of Hawai'i \(UH\)](#)