

11/18/2019

eTRAVEL ENHANCEMENTS: WHAT'S NEW?

JABSOM ADMINISTRATORS' MEETING
NOVEMBER 2, 2017 | 9:30 AM
MEB 301

Updated: 11/20/2019

WHAT HAS NOT CHANGED?

- No Change to Policies ([AP 8.851](#))
- Continue to use eTravel for these fund types:
 - Tuition (2xxxxxx), RTRF (3xxxxxx), Trust (4xxxxxx)
 - Private (4xxxxxx), Federal (6xxxxxx): Only when used with Tuition, RTRF, or Trust.
 - If solely Private or Federal funds, use RCUH Financial System.
- No change to eTravel Electronic Features:
 - Email Notifications, Approvals, Ad Hoc Routing, Attachments
- No change to JABSOM Internal No-Cost Travel Procedures: <http://blog.hawaii.edu/ofaa/travel/>

WHAT HAS CHANGED?

- Added Business Office Electronic Approval
- Implementation of Paperless UH eTravel Submissions
 - Retention of Original Documentation
- Procedure for UH Foundation (UHF) Funded Travel
 - Submission of Original Documentation

UH FUNDED eTRAVEL ELECTRONIC APPROVALS

ROLE	DEFINITION	INTRA-STATE		OUT-OF-STATE		NO COST	
		R	C	R	C	R	C
Preparer	Department Administrator	X	X	X	X	X	X
Traveler	Traveler	X	X	X	X	X	X
Business Office	Fiscal Administrator	X	X	X	X		
Supervisor	Traveler's Immediate Supervisor	X	X	X	X	X	
Account Supervisor	Principal Investigator / Approving Authority	X	X	X	X		
Dept Chair	Department Chair (Ad Hoc)	X	X*	X	X*	X	
Executive Authority	Dean (and/or Delegate)			X		X**	
Fiscal Admin	Fiscal Administrator	X	X	X	X		

- LEGEND:

- R = Request, C = Completion
- * only required for itinerary changes
- ** if traveling out of-state

JABSOM Office of Central Fiscal & Human Resources

PAPERLESS UH FUNDED eTRAVEL SUBMISSIONS

- **Departments/Programs:** Do not submit hard copy printouts of eTravel Forms or Original Receipts. Retain original documentation in files for one year.
- **Fiscal Office:** Review and approve electronic submissions.
- Refer to JABSOM Internal Cost UH eTravel Procedures: <http://blog.hawaii.edu/ofaa/travel/>

100% UH FOUNDATION (UHF) FUNDED TRAVEL REQUEST

1. Create and complete Travel Request in UH eTravel System. Upload documentation.
2. Press the 'Submit' button. Then press the 'Print' button. Travel Request with approval lines should appear.
3. If advance check is required, complete and print [UHF Check Request Form](#).
4. Obtain Signatures:
 - a. Travel Request:
 - i. Traveler
 - ii. Supervisor
 - iii. Department Chair
 - iv. Dean (if out-of-state)
 - b. UHF Check Request Form (only if advance check required):
 - i. Traveler
 - ii. Account Administrators (2x) (send to Kathy Tanaka or Adell Vierra **only if 2nd approval is not available w/in dept or prgm**)
 - iii. Chancellor (only for Dean's reimbursements)
5. Attach original documentation to hard copy forms.
6. Submit to UH Foundation for processing.

100% UHF FUNDED TRAVEL COMPLETION

1. Create and complete Travel Completion in UH eTravel System. Upload documentation.
2. Press the 'Submit' button. Then press the 'Print' button. Travel Completion with approval lines should appear.
3. If completion check is required, complete and print [UHF Check Request Form](#).
4. Obtain Signatures:
 - a. Travel Completion:
 - i. Traveler
 - ii. Supervisor
 - iii. **Department Chair (if itinerary changes)**
 - b. UHF Check Request Form (only if completion check required):
 - i. Traveler
 - ii. Account Administrators (2x) (send to Kathy Tanaka or Adell Vierra **only if 2nd approval is not available w/in dept or prgm**)
 - iii. Chancellor (only for Dean's reimbursements)
5. Attach original documentation to hard copy forms. Attach Travel Request if an advance check was not issued.
6. Submit to UH Foundation for processing.

MIXED UHF + UH FUNDED TRAVEL REQUEST

1. Create and complete Travel Request in UH eTravel System. Upload documentation. Notate whether UH or UHF will be paying for a particular expense.
2. Press the 'Submit' button. Check route log. Ad Hoc Dept Chair as needed. Print Travel Request.
3. If advance check is required for a UHF funded expense, complete and print [UHF Check Request Form](#).
4. Obtain Signatures:
 - a. Travel Request: Print route log after all electronic approvals obtained.
 - b. UHF Check Request Form (only if advance check required for a UHF funded expense):
 - i. Traveler
 - ii. Account Administrators (2x) (send to Kathy Tanaka or Adell Vierra **only if 2nd approval is not available w/in dept or prgm**)
 - iii. Chancellor (only for Dean's reimbursements)
5. Attach original documentation to hard copy forms.
6. Submit to **UH Foundation** for processing.

MIXED UHF + UH FUNDED TRAVEL COMPLETION

1. Create and complete Travel Completion in UH eTravel System. Upload documentation. Notate whether UH or UHF will be paying for a particular expense.
2. Press the 'Submit' button. Check route log. Ad Hoc Dept Chair as needed. Print Travel Completion.
3. If completion check is required for a UHF funded expense, complete and print [UHF Check Request Form](#).
4. Obtain Signatures:
 - a. Travel Completion: Print route log after all electronic approvals obtained.
 - b. UHF Check Request Form (only if completion check required for a UHF funded expense):
 - i. Traveler
 - ii. Account Administrators (2x) (send to Kathy Tanaka or Adell Vierra **only if 2nd approval is not available w/in dept or prgm**)
 - iii. Chancellor (only for Dean's reimbursements)
5. Attach original documentation to hard copy forms.
6. Submit to **UH Foundation** for processing.

WHAT HARD COPIES DO I SUBMIT?

ITEM	UH \$ ONLY	UHF \$ ONLY	UHF \$ + UH \$
Travel Form		X	X
UHF Check Request		X	X
Original Receipts		X	X
Submit to:	Retain all originals in dept's files	UH Foundation	UH Foundation

RESOURCES

- Profiler
 - www.hawaii.edu/profiler
- eTravel
 - www.hawaii.edu/etravel
- eTravel Enhancements
 - www.hawaii.edu/etravel/releases_new.html
- UH Foundation
 - <https://www.uhfoundation.org/resources/forms>
- JABSOM Fiscal
 - blog.hawaii.edu/ofaa/travel/