

Travel Quick Guide for Delegates

This guide is for delegates. If you are a traveler, please refer to the Travel Quick Guide for Travelers. To become a delegate, see the Add a Delegate instructions. Note that a traveler must login and make you a delegate. Alternatively, you can contact Lisa Bradshaw.

When acting as a delegate, make sure that you are operating as the traveler. The traveler name should be in the upper right-hand corner. If it is not, click on the name and choose the name of the traveler. If you are the delegate for more than 5 individuals, you will see Select Another User, select that link and then select the individual. See Creating an Expense Report as a Delegate in the Chrome River manual for more information.

Pre-Approval – Before travel

A pre-approval must be created and approved prior to making any travel arrangements. Prior to creating a pre-approval, the traveler should discuss the travel with their supervisor.

For step-by-step instructions on creating a pre-approval, please see the Travel section of the Chrome River manual.

Note that a pre-approval does not need to include exact amounts. A pre-approval is simply an estimate of how much a trip will cost. The expense categories are there to help you appropriately estimate the full cost of the travel event.

Once a pre-approval has been created it will be routed to the BCM over the Index entered for approval. Once approved, it will be exported to Banner. Banner exports are processed the day after they have been approved. The traveler will receive an email with their T number once it has been imported into Banner.

After the travel pre-approval has been approved, if air travel needs to be booked, contact Lisa Bradshaw. She will work with you to book your air travel. Utilizing Lisa to book your travel will result in a much lower Travel Agent Fee. Alternatively, you can contact our approved travel agency and pay the full agency fee to book travel.

Expense Report – After travel

Note that all purchasing card transactions related to the travel must be in the traveler's eWallet before you complete the Expense Report.

- If transactions were made using the traveler's p-card and they are not listed in their eWallet, you must wait until the transactions are uploaded into their eWallet to complete the Travel Expense Report.
- If any travel expenses made using a purchasing card of a person who is not the traveler, e.g., an admin or delegate, contact Lisa Bradshaw to request the transaction be moved to the traveler's eWallet.
- Airfare charges will be moved into your eWallet by Lisa Bradshaw. If you do not see them, please contact Lisa Bradshaw.

For step-by-step instructions for completing a Travel Expense Report, see the Travel section of the Chrome River Manual.

DO NOT include travel expenses on your monthly Purchasing Card Expense Report.