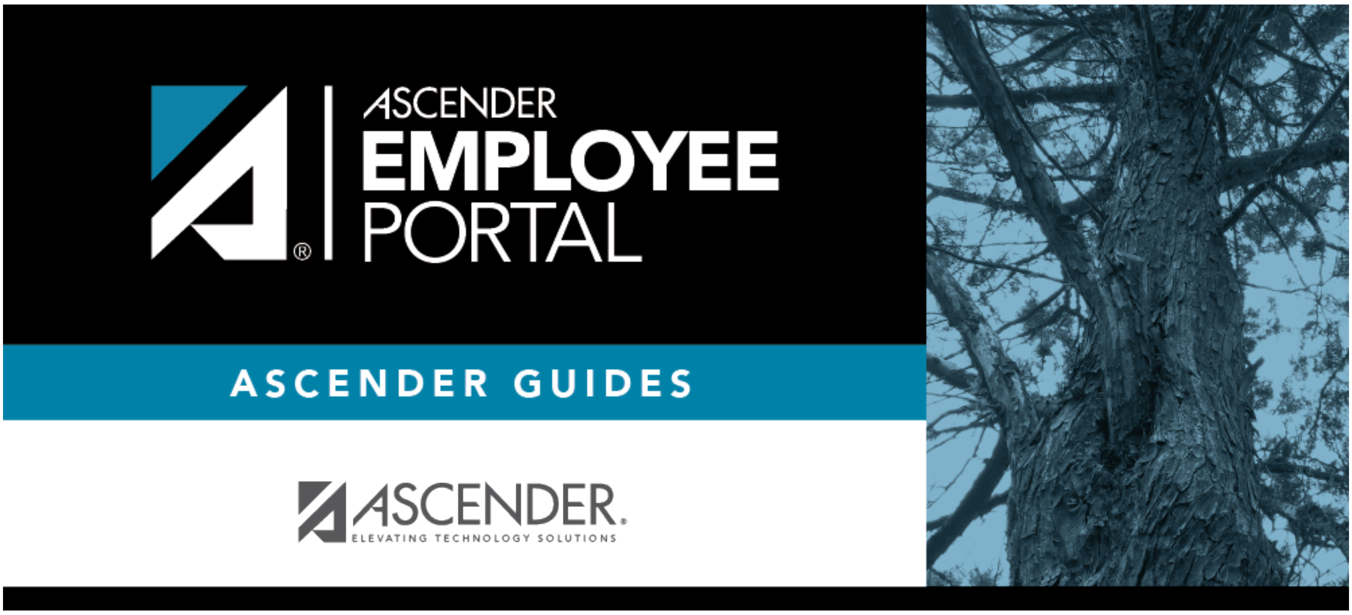
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ELEVATING TECHNOLOGY SOLUTIONS

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You have two options to create a travel request.

Option 1: Click **Add** in the upper-right corner of the Travel Requests page. The Add Travel Request pop-up window opens.

Option 2: From the EmployeePortal homepage calendar, you will notice that the current day is highlighted in yellow.

TIP: If you have any existing approved, pending, or saved travel requests, the entry is displayed for that day on the calendar. You can click the entry to open the details of the request.

- Click the day for which you want to enter a travel request. The Add Request Type pop-up window opens allowing you select the type of request you want to enter.
- Click **Travel**. The Add Travel Request pop-up window opens. The **From Date** and **To Date** fields are automatically populated with the date you selected from the calendar. For extended travel requests, select the applicable **To Date**.

Mileage travel request:

❏ If entering a single travel date or multiple consecutive travel dates for non-extended travel (mileage & incidentals), ensure the following fields are completed:

From Date	Type the date on which the travel occurred in the MM-DD-YYYY format. Or, click to select a date. If entering a single date of travel, a **To Date** is not necessary.
To Date	Type the date on which the travel ended in the MM-DD-YYYY format. Or, click to select a date.
Campus	The campus is automatically populated with your assigned pay campus. **Admin Note**: The pay campus is retrieved from the highest pay frequency where the employee is active.

❏ If the **From Date** and **To Date** selections exceed a single day, the **Overnight Trip?** check box is displayed.

Do not select the **Overnight Trip?** check box for non-extended travel.

Note: Selecting the **Overnight Trip?** check box allows the display of the additional fields needed when creating an extended travel request entry.

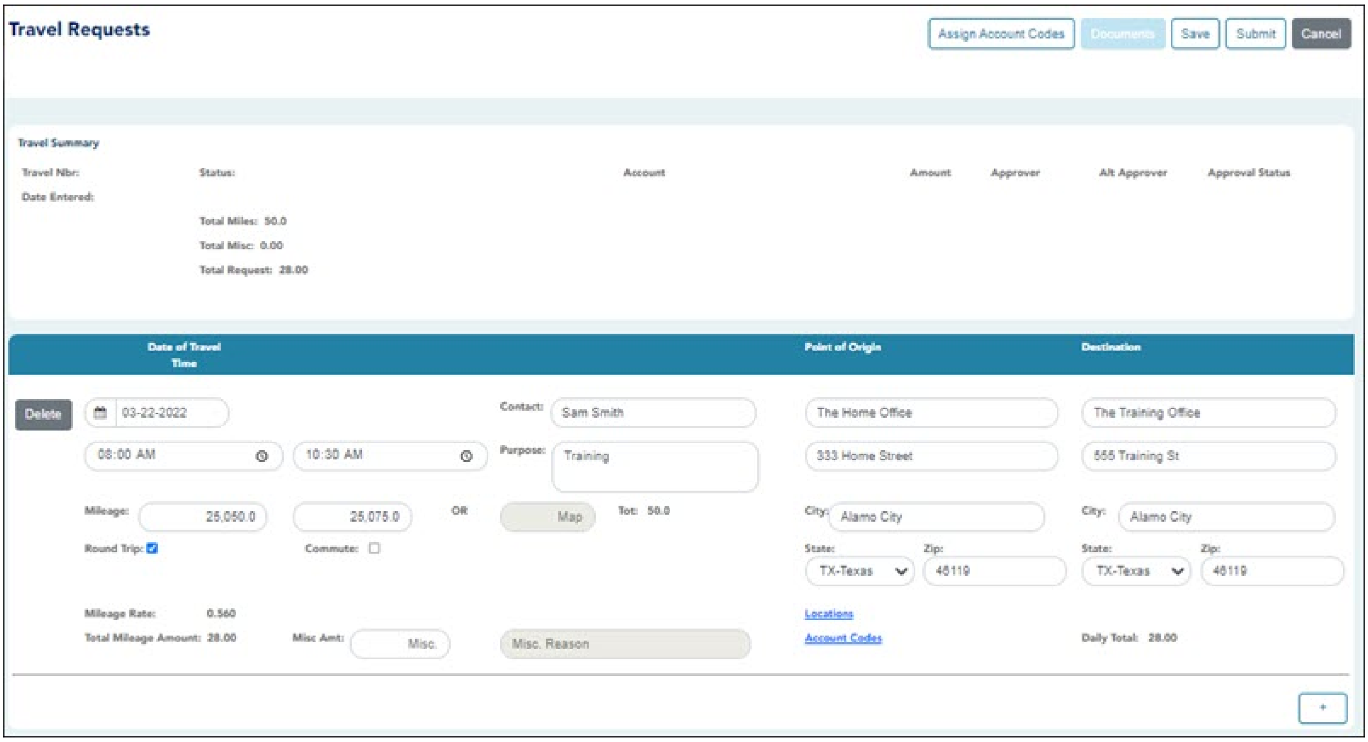
❑ Click **Add**. The Travel Request page is displayed with an entry for each day of your travel with dates populated according to your selected to/from dates.

Otherwise, click **Cancel** to close the Add Travel Request pop-window and return to the EmployeePortal calendar or the Travel Request page.

The Travel Summary is displayed at the top of the page with the following details:

Note: If you are entering a new request, this information is blank.

- **Travel Nbr** - Displays the assigned travel number.
- **Status** - Displays the status of the travel request.
- **Date Entered** - Displays the date the travel request was entered.
- **Total Miles** - Displays the total miles traveled minus commute miles.
- **Total Misc** - Displays the total amount of all miscellaneous items.
- **Total Request** - Displays the total amount of the travel request (mileage + miscellaneous items).
- **Account** - Displays the assigned account codes to be expensed.
- **Amount** - Displays the amount to be expensed for each assigned account code.
- **Approver** - Displays the approver's name.
- **Alternate Approver** - Displays the approver's alternate approver if any.
- **Approval Status** - Displays the approver's approval status (*Approved*, *Pending*, or *Returned*).



Mileage Travel Request

❑ Complete the following information for the request:

Date	The travel date is automatically populated with the date you selected in the Add Travel Request window but can be changed. Type the date on which the travel occurred in the MM-DD-YYYY format. Or, click to select a date from the calendar.
From Time	Type the time at which you departed the origin location (start time) in the HH MM AM/PM format. Or, click to select the start time.
To Time	If the entry is round trip, type the time at which you returned to the origin location (end time) in the HH MM AM/PM format. If the entry is a one-way trip, type the time you arrived at your destination. Or, click to select the end time.
Contact	Type the name of your contact person at the destination. This field can be a maximum of 40 characters and is required.
Purpose	Type the purpose of the trip. This field can be a maximum of 180 characters and is required.
Mileage Start	Type the beginning odometer reading. If this field is used, leave the **Map** field blank.
Mileage Stop	Type the ending odometer reading. If this field is used, leave the **Map** field blank.
Mileage Map	This field can be used to enter the total reimbursable miles. If this field is used, leave the **Mileage Start/Stop** fields blank. Type the number of miles from the point of origin to the destination point if one-way, calculated using mapping software. For round-trip, double the mileage of the one-way total.
Tot	The total mileage (Start Mileage - Stop Mileage) for the entry is calculated and displayed.
Round Trip	Select to indicate that the entry is round trip with the same mileage each way (two one-way trips, one from Point A to Point B and the other from Point B to Point A). Selecting **Round Trip** doubles the total mileage for the entry.
Commute	Select to include your commute distance in the mileage calculation. This is the mileage that you would normally travel from home to work and vice versa. If **Round Trip** is selected, the commute mileage is deducted twice from the total mileage. If **Round Trip** is not selected, the commute mileage is only deducted once from the total mileage. For example, if you enter a one-way trip leaving from home to a destination for a total of 50 miles and your commute distance is set to 20 miles, then your total mileage for the request is 30 miles (50 - 20).
Mileage Rate	The mileage reimbursement rate is displayed. This rate is set up in the ASCENDER Finance application according to the travel dates.
Total Mileage Amount	The total amount to be reimbursed for the entry (Total Mileage - Commute Distance x Mileage Reimbursement Rate) is displayed.
Misc Amt	Type the amount of any additional expenses for items such as tolls, parking fees, etc. In the **Misc Reason** field, indicate the reason for the miscellaneous amount.

TIP: If the **Mileage** (Start, Stop, and Map) fields, **Point of Origin**, and **Destination** fields are disabled, the Location Locking feature has been enabled by your EmployeePortal administrator and you must click the Locations link to select from a predefined list of travel locations and distances.

❏ Under **Point of Origin**:

Origin Description	Type a description for the starting location.
Origin Address	Type the address at which you started.
City	Type the city name for the origin address. This field can be a maximum of 25 characters.
State	Click to select a state for the origin address.
Zip	Type the five-digit zip code for the origin address.

❏ Under **Destination**:

Destination Description	Type a description for the ending location.
Destination Address	Type the address to which you traveled.
City	Type the city name for the destination address. This field can be a maximum of 25 characters.
State	Click to select a state for the destination address.
Zip	Type the five-digit zip code for the destination address.

❏ If Location Locking is enabled, click the **Locations** link to open and select from a predefined list of travel locations.

Assign account codes:

❏ Click the **Account Codes** link to assign an account code to a specific travel day within the travel request. Or, click the **Assign Account Codes** button at the top of the page to assign account codes to the entire travel request.

The Assign Account Codes pop-up window opens allowing you to enter account code information for the travel request. Only account codes to which you have access are displayed.

The **Assign Account Codes** button overrides any accounts code assignments for a specific travel day within a travel request.

- Click **+Add** to add a blank account code line. You can add additional account codes rows as needed.
- In the **Account Code** column, type the account code. Or, click ⋮ to open the Account Codes pop-up window and search for an account code.
  - Type the applicable account code components, click ⋮ to open the Fund Search pop-up window, or leave blank for all account codes, and then click **Search**. A list of available account codes is displayed.
  - Select an account code from the list. The **Account Code** and **Description** fields are populated with the selected account code.
  - Click **Clear** to clear your selections.
  - Click X to close the Account Codes pop-up window.
- In the **Percent** column, type the percent of the travel request amount to be expensed to the account code. Or, in the **Amount** column, type the dollar amount of the travel request amount to be expensed to the account code.

❏ Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.

❏ Click **Calculate Amount** to populate the **Amount** column based on the percentage entered in the **Percent** column.

The total percentage and amount distribution for all accounts listed is displayed.

❏ Click **OK** to save your changes and close the pop-up window. Click **X** or **Cancel** to close the pop-up window without saving your changes.

❏ Click **+** to add an additional travel request entry.

Extended travel request:

❏ If entering multiple consecutive travel dates for extended travel (mileage, lodging, meals, and incidentals), complete the following fields:

From Date	Type the date on which the travel occurred in the MM-DD-YYYY format. Or, click 📅 to select a date. If entering an extended travel request, indicate the first date of travel.
To Date	Type the date on which the travel ended in the MM-DD-YYYY format. Or, click 📅 to select a date. If entering an extended travel request, indicate the last date of travel.
Campus	The campus is automatically populated with your assigned pay campus. **Admin Note**: The pay campus is retrieved from the highest pay frequency where the employee is active.

❏ If the **From Date** and **To Date** selections exceed a single day, the **Overnight Trip?** check box is displayed.

Select the **Overnight Trip?** check box. The time fields are displayed.

> **Note**: Selecting the **Overnight Trip?** check box allows the display of the additional fields needed when creating an extended travel request entry.

From Time	Type the time at which you departed the origin location (start time) in the HH MM AM/PM format. Or, click ⏲ to select the start time.
To Time	Type the time at which you returned to the origin location (end time) in the HH MM AM/PM format. Or, click ⏲ to select the end time.

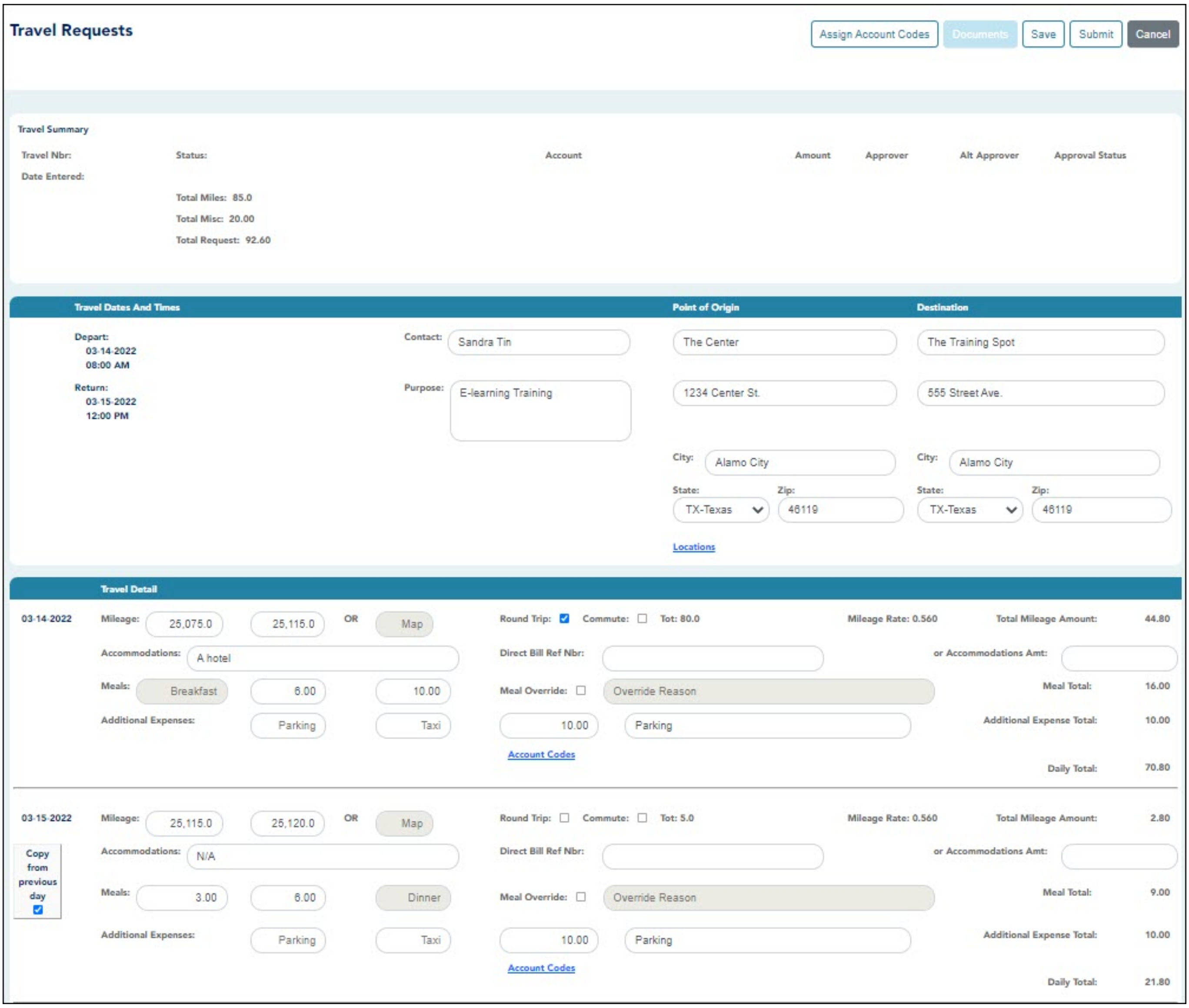
❏ Click **Add**. The Travel Request page is displayed with an entry for each day of your travel with dates populated according to your selected to/from dates.

Otherwise, click **Cancel** to close the Add Travel Request pop-window and return to the EmployeePortal calendar or the Travel Request page.

The Travel Summary is displayed at the top of the page with the following details:

> **Note**: If you are entering a new request, this information is blank.

- **Travel Nbr** - Displays the assigned travel number.
- **Status** - Displays the status of the travel request.
- **Date Entered** - Displays the date the travel request was entered.
- **Total Miles** - Displays the total miles traveled minus commute miles.
- **Total Misc** - Displays the total amount of all miscellaneous items.
- **Total Request** - Displays the total amount of the travel request (mileage + miscellaneous items).
- **Account** - Displays the assigned account codes to be expensed.
- **Approver** - Displays the approver's name.
- **Alternate Approver** - Displays the approver's alternate approver if any.
- **Approval Status** - Displays the approver's approval status (*Approved*, *Pending*, or *Returned*).



Extended Travel Request

❑ Complete the following information for the request:

The **Depart** and **Return** fields are automatically populated with the dates and times selected in the Add Travel Request pop-up window.

❑ After all travel details have been entered for the first day's entry, the **Copy from Previous Day** check box is displayed on subsequent entries. Select this check box to copy all travel details from the previous day's entry and make changes as needed. This feature overrides any existing data and replaces it with the previous day details. If selecting this check box on the last travel day and the day from which you are copying has a dinner amount, the **Dinner** field will not be populated if the return time is not later than the **Dinner Eligible Return Time** as defined in ASCENDER Finance.

Contact	Type the name of your contact person at the destination. This field can be a maximum of 40 characters and is required.
Purpose	Type the purpose of the trip. This field can be a maximum of 180 characters and is required.

❑ Under **Point of Origin**:

Origin Description	Type a description for the starting location.
Origin Address	Type the address at which you started.
City	Type the city name for origin address. This field can be a maximum of 25 characters.
State	Click ⌄ to select a state for the origin address.
Zip	Type the five-digit zip code for the origin address.

❑ Under **Destination**:

Destination Description	Type a description for the ending location.
Destination Address	Type the address to which you traveled.
City	Type the city name for the destination address. This field can be a maximum of 25 characters.
State	Click ⌄ to select a state for the destination address.
Zip	Type the five-digit zip code for the destination address.

❑ Under **Travel Detail**, there is an entry section for each travel day. Complete the applicable fields:

Mileage Start	Type the beginning odometer reading. If this field is used, leave the **Map** field blank.
Mileage Stop	Type the ending odometer reading. If this field is used, leave the **Map** field blank.
Mileage Map	This field can be used to enter the total reimbursable miles. If this field is used, leave the **Mileage Start/Stop** fields blank. Type the number of miles from the point of origin to the destination point if one-way, calculated using mapping software. For round-trip, double the mileage of the one-way total.
Round Trip	Select to indicate that the entry is round trip with the same mileage each way (two one-way trips, one from Point A to Point B and the other from Point B to Point A). Selecting **Round Trip** doubles the total mileage for the entry.
Commute	Select to include your commute distance in the mileage calculation. This is the mileage that you would normally travel from home to work and vice versa. If **Round Trip** is selected, the commute mileage is deducted twice from the total mileage. If **Round Trip** is not selected, the commute mileage is only deducted once from the total mileage. For example, if you enter a one-way trip leaving from home to a destination for a total of 50 miles and your commute distance is set to 20 miles, then your total mileage for the request is 30 miles (50 - 20).
Tot	The total mileage (Start Mileage - Stop Mileage) for the entry is calculated and displayed.
Mileage Rate	The mileage reimbursement rate is displayed. This rate is set up in ASCENDER Finance according to the travel dates.
Total Mileage Amount	The total amount to be reimbursed for the entry (Total Mileage - Commute Distance x Mileage Reimbursement Rate) is displayed.

Accommodations	If a hotel stay was necessary, type the name of the hotel. This field can be a maximum of 35 characters. The hotel expense can be paid one of two ways: You can pay the bill and request reimbursement. In this case, type the amount in the **Reimbursement Amt** field. The hotel can direct bill the LEA or service center. In this case, type the reference number in the **Direct Bill Ref Nbr** field (up to 20 characters).
Meals	In the **Breakfast**, **Lunch**, and **Dinner** fields, type the amount for incurred meal expenses. These amounts cannot exceed the limits set by your EmployeePortal administrator in ASCENDER Finance. **Notes**: • To be reimbursed for breakfast on the first travel day, the from (departure) time must be earlier than the **Breakfast Eligible Depart Time** as defined in ASCENDER Finance. • To be reimbursed for dinner on the last travel day, the to (return) time must be later than the **Dinner Eligible Return Time** as defined in ASCENDER Finance. If you need further information about these amounts and times, contact your supervisor or EmployeePortal administrator.
Meal Override	Select if any meal expenses for the date exceeded the limits. If selected, an explanation is required in the **Override Reason** field.
Meal Total	The sum of expenses for breakfast, lunch, and dinner is displayed.
Additional Expenses	In the **Parking**, **Taxi**, or **Misc** fields, type the amount of any parking, taxi, or miscellaneous expenses for the day. The **Misc** field is used for expenses that do not fall under any of the other categories. If an amount is entered in the **Misc** field, an explanation is required in the **Misc Reason** field.
Additional Expense Total	The sum of all additional expenses for the day is displayed.
Daily Total	The sum of all expenses for the day is displayed.

Assign account codes:

❏ Click the **Account Codes** link to assign an account code to a specific travel day within the travel request. Or, click the **Assign Account Codes** button at the top of the page to assign account codes to the entire travel request.

The Assign Account Codes pop-up window opens allowing you to enter account code information for the travel request. Only account codes to which you have access are displayed.

> The **Assign Account Codes** button overrides any accounts code assignments for a specific travel day within a travel request.

- Click **+Add** to add a blank account code line. You can add additional account codes rows as needed.
- In the **Account Code** column, type the account code. Or, click to open the Account Codes pop-up window and search for an account code.
    - Type the applicable account code components, click to open the Fund Search pop-up window, or leave blank for all account codes, and then click **Search**. A list of available account codes is displayed.
    - Select an account code from the list. The **Account Code** and **Description** fields are populated with the selected account code.
    - Click **Clear** to clear your selections.
    - Click X to close the Account Codes pop-up window.
- In the **Percent** column, type the percent of the travel request amount to be expensed to the account code. Or, in the **Amount** column, type the dollar amount of the travel request amount to be expensed to the account code.

❑ Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.

❑ Click **Calculate Amount** to populate the **Amount** column based on the percentage entered in the **Percent** column.

The total percentage and amount distribution for all accounts listed is displayed.

❑ Click **OK** to save your changes and close the pop-up window. Click **X** or **Cancel** to close the pop-up window without saving your changes.

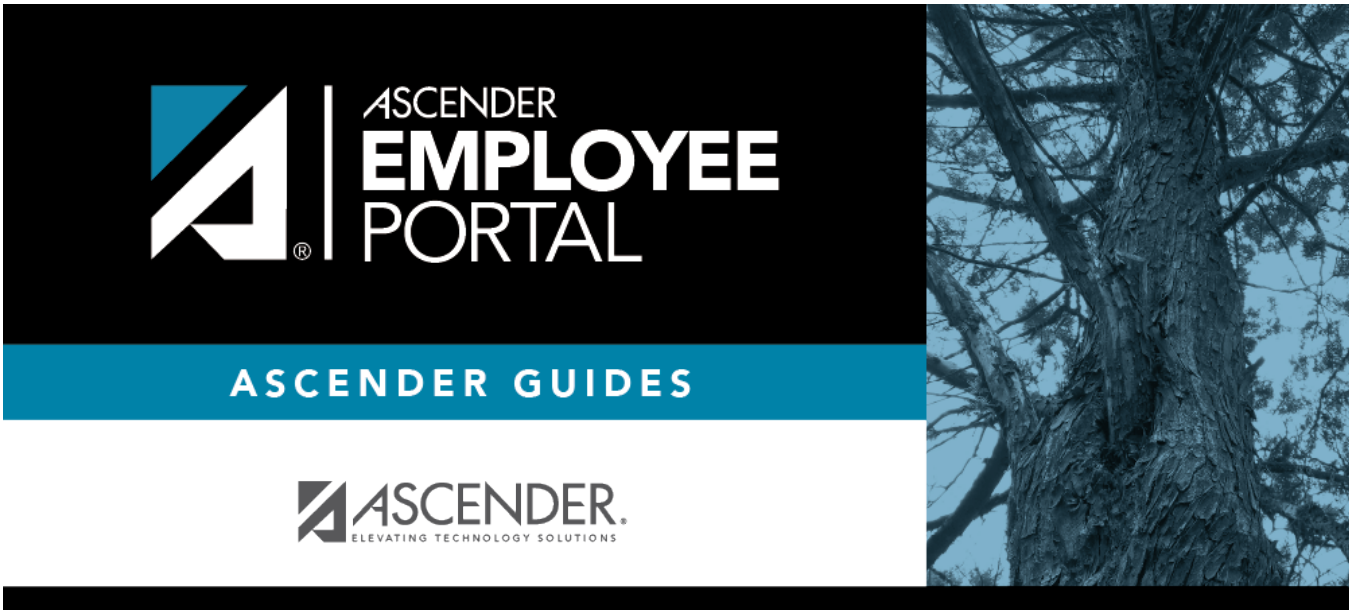
Once you have completed your travel request:

❑ Click **Save** to save the request without submitting it for approval. The **Documents** button at the top of the page is enabled allowing you to upload documents such as receipts, maps, etc. Once the request is saved, you can return to it at a later time to make changes and/or submit it for approval.

❑ Click **Submit** to submit the request for approval. The request is sent through the appropriate approval path.

You will receive an email message when the request is approved/returned.

❏ Click **Cancel** to return to the Travel Requests page.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