Travel Plan (TP) for Pre-Trip Approval

According to University policy, all travel must be authorized and approved by the appropriate administrative officer within the unit. The Travel Plan (TP) is used to request pre-trip approval. Once the TP is submitted, it will be routed through the appropriate workflow process. The process of submitting a request for pre-trip approval is similar to creating an Expense Report (ER)—start by creating a TP.

Step	Task
1.	Select the **Travel Plan** icon.
2.	Complete the **Document Header** information**.** 1) Enter a unique **Report Title.** 2) Select a **C-FOP** from the **Project** menu (note the **Find Project** icon). 3) Select the type of trip from the **Trip Type** menu. 4) Select a business travel reason from the "**Business Reason" Travel** menu. 5) Select a purpose from the **Purpose** menu (for details, refer to the *Purpose of the Document* job aid).
3.	Click the **Continue** button.
4.	Select a **Travel Type** item from the menu.
5.	Click the **Add Item** button.
6.	Enter information in the fields under **Standard Information.** The fields that display may vary depending on the Travel Type.
7.	Enter a note in the **Notes** field if necessary.
8.	Click the **Save** button.
9.	Repeat steps 6 through 9 to add additional Travel Type items.
10.	Click the **Submit** button.

Additional information:

- Business Purpose/Justification is the *who*, *what*, *where*, and *why* of the request.
- The Business Purpose/Justification text field cannot exceed 35 characters.
- Notes are used for additional information.
- Payee Affiliation designates the person being paid and their relationship to the University.
- Dates are the "date of purchase," unless it is stated otherwise.
- A Project (C-FOP), other than the default, can be searched by using the Find Project (binoculars) icon or it can be selected at any time from the Project menu.
- If it is a personal expense, check "Do Not Reimburse (Personal)" under the Standard Information.
- Traveler, Creator, and Reviewer/Approver will receive alert email notifications based on status.