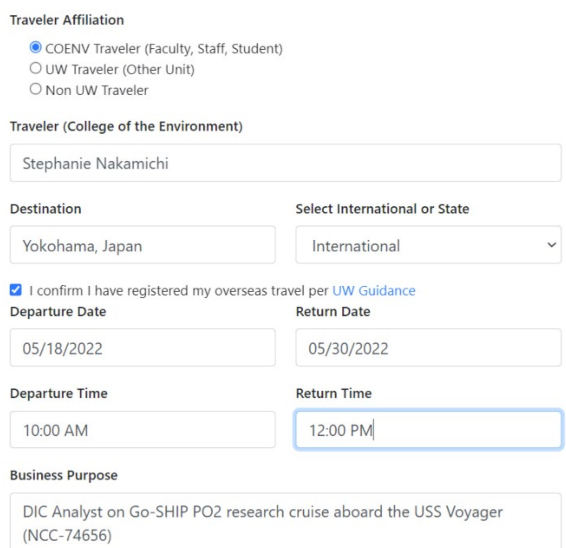
TREQ User Guide: Travel Pre-Authorization

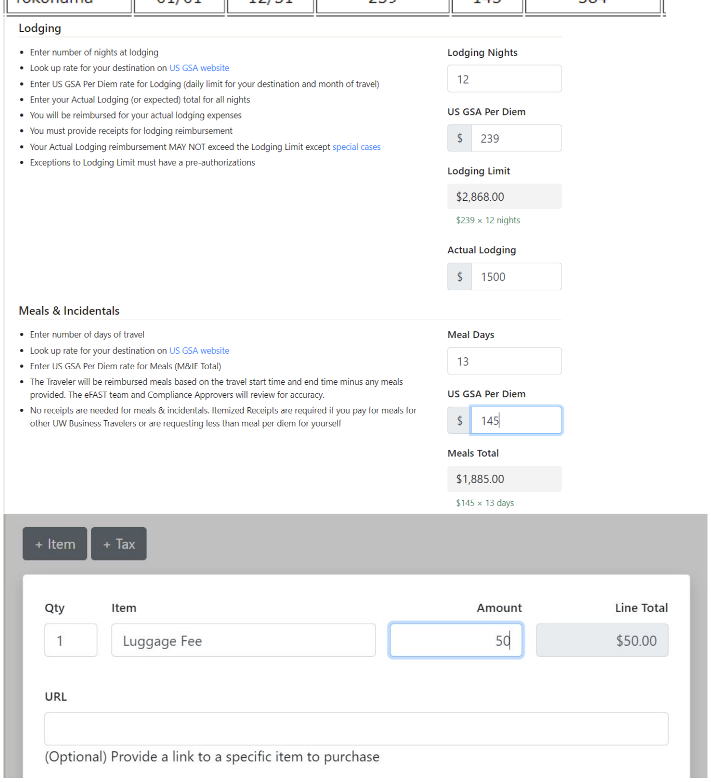
Travel Pre-Authorization is used to provide details and estimated expenses of an upcoming trip, and then get approval from the appropriate Directors, Principal Investigators and Budget Managers. ***If you have any questions, please email efast@uw.edu***



Step 1: Enter Basic Trip Details

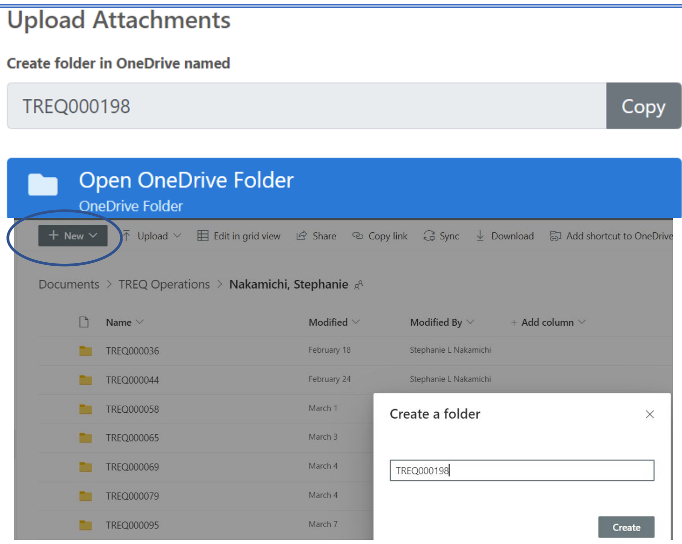
- On the first page of the Pre-Travel Authorization select the Traveler Affiliation.
- Type in the Traveler name and destination
- Select State or International
    - A registration reminder will populate if travel is international
- Enter travel dates and times
    - You may estimate travel times as actual travel times will be accounted for in the post travel form
- In business purpose, please specify how this trip is benefiting UW or, if applicable, the grant.
- Check off personal time or advance per diem request if applicable

Post Name	Season Begin	Season End	Maximum Lodging Rate	M & IE Rate	Maximum Per Diem Rate
Yokohama	01/01	12/31	239	145	384



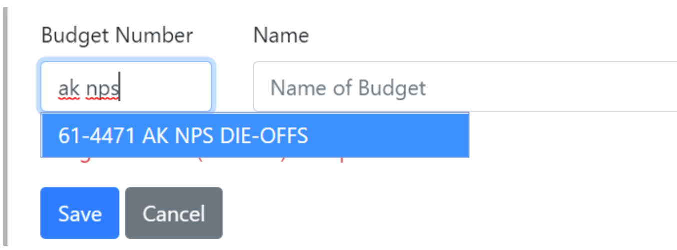
Step 2: Estimated Expenses

- For per diem: Follow the GSA link in TREQ (highlighted in blue) and search for the location of your trip
    - Search by City, State or ZIP or by using the map. Locate the per diem rate in the corresponding month and location.
    - Enter daily rate into TREQ. TREQ will auto calculate the estimated per diem.
    - If actual lodging is already known, you may override in the "**Actual Lodging**" field
- All other estimated expenses are entered in the table
    - Common expenses are automatically.
    - Leave unused expenses as $0 if they are not needed or you can select the line item and then click "**Delete**"
- You can add additional expenses by clicking on the **"+ Item**" button
    - There is an optional text field to add an URL if desired
- Click "**Save & Continue**"



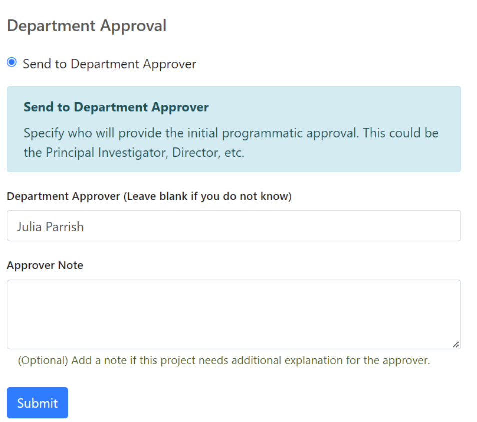
Step 3: Upload Supporting Documents

- Click on the grey "**Copy**" button to copy the unique TREQ Number
- Click on "**Open OneDrive Folder**"
  - *This will open a new browser tab*
- Create a new folder with the title of the unique TREQ Number
- Upload applicable files in the new TREQ folder
  - If you already have some supporting documents, please upload them now:
    - *Receipts for airfare, lodging, car service, etc.*
    - *Award letter, conference agendas, meeting invitations, etc.*
- When done, go back to TREQ tab and click "**Done Uploading**"



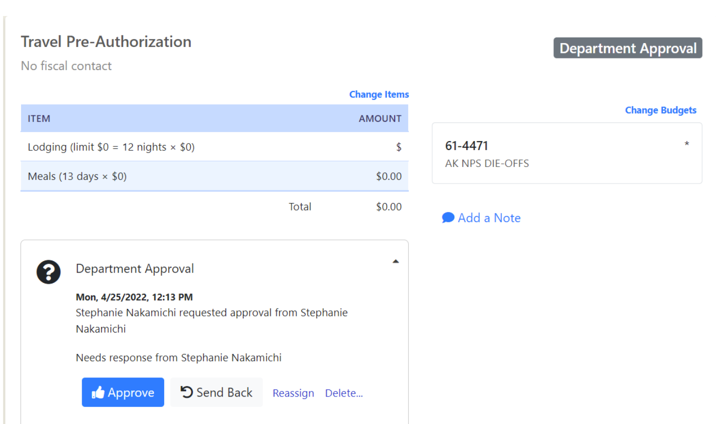
Step 4: Enter Budget Information

- Type is the applicable budget number or name
- Select the correct budget
- You can split the cost among other budgets by selecting the split type and adding other budgets by clicking "**+ Budget**"
- When done, click "**Continue**"



Step 5: Review & Submit

- On the final page Review the information previously entered and submit
  - Approvers will automatically populate based on the budget information entered
- If everything looks good, click "**Submit**"
- If the approver is blank or incorrect, you can change to another College of the Environment personnel
- If a department approver is blank, TREQ will route to eFAST for further assistance



What Comes Next?

- If the pre-populated approver is yourself, you will have the option to approve afterwards on the next TREQ order page
- Once the programmatic "department" approver has approved, TREQ will prompt the budget manager for review and approval
- Once approved, the pre-authorization is complete! TREQ will send a notification of completion to the preparer.
- Once a traveler has incurred expenses, you can add a travel reimbursement to your pre-authorization and the trip information will already be saved!