

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*

Traveler Affiliation

- COENV Traveler (Faculty, Staff, Student)
- UW Traveler (Other Unit)
- Non UW Traveler

Traveler (College of the Environment)

Stephanie Nakamichi

Destination

Yokohama, Japan

Select International or State

International

I confirm I have registered my overseas travel per [UW Guidance](#)

Departure Date

05/18/2022

Return Date

05/30/2022

Departure Time

10:00 AM

Return Time

12:00 PM

Business Purpose

DIC Analyst on Go-SHIP PO2 research cruise aboard the USS Voyager (NCC-74656)

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

Lodging

- Enter number of nights at lodging
- Look up rate for your destination on [US GSA website](#)
- Enter US GSA Per Diem rate for Lodging (daily limit for your destination and month of travel)
- Enter your Actual Lodging (or expected) total for all nights
- You will be reimbursed for your actual lodging expenses
- You must provide receipts for lodging reimbursement
- Your Actual Lodging reimbursement MAY NOT exceed the Lodging Limit except [special cases](#)
- Exceptions to Lodging Limit must have a pre-authorizations

Lodging Nights

12

US GSA Per Diem

\$ 239

Lodging Limit

\$2,868.00

\$239 x 12 nights

Actual Lodging

\$ 1500

Meals & Incidentals

- Enter number of days of travel
- Look up rate for your destination on [US GSA website](#)
- Enter US GSA Per Diem rate for Meals (M&IE Total)
- The Traveler will be reimbursed meals based on the travel start time and end time minus any meals provided. The eFAST team and Compliance Approvers will review for accuracy.
- No receipts are needed for meals & incidentals. Itemized Receipts are required if you pay for meals for other UW Business Travelers or are requesting less than meal per diem for yourself

Meal Days

13

US GSA Per Diem

\$ 145

Meals Total

\$1,885.00

\$145 x 13 days

+ Item + Tax

Qty	Item	Amount	Line Total
1	Luggage Fee	50	\$50.00

URL

(Optional) Provide a link to a specific item to purchase

Step 2: Estimated Expenses

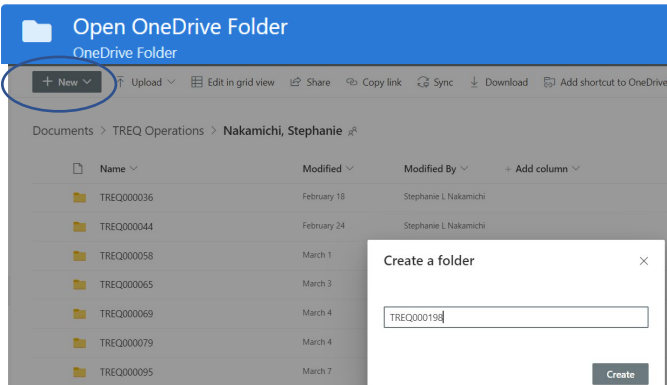
- For per diem: Follow the GSA link in TREQ (highlighted in blue) and search for the location of your trip
 - Search by City, State or ZIP or by using the map. Locate the per diem rate in the corresponding month and location.
 - Enter daily rate into TREQ. TREQ will auto calculate the estimated per diem.
 - 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”**

Upload Attachments

Create folder in OneDrive named

TREQ000198

Copy



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”

Budget Number

Name

ak nps

Name of Budget

61-4471 AK NPS DIE-OFFS

Save

Cancel

Step 4: Enter Budget Information

- Type in 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”

Department Approval

- Send to Department Approver

Send to Department Approver

Specify who will provide the initial programmatic approval. This could be the Principal Investigator, Director, etc.

Department Approver (Leave blank if you do not know)

Julia Parrish

Approver Note

(Optional) Add a note if this project needs additional explanation for the approver.

Submit

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

Travel Pre-Authorization

No fiscal contact

Department Approval

ITEM	AMOUNT	
Lodging (limit \$0 = 12 nights × \$0)	\$	61-4471 AK NPS DIE-OFFS
Meals (13 days × \$0)	\$0.00	
Total	\$0.00	

Add a Note



Department Approval

Mon, 4/25/2022, 12:13 PM

Stephanie Nakamichi requested approval from Stephanie Nakamichi

Needs response from Stephanie Nakamichi

Approve

Send Back

Reassign Delete...

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!