

New Travel Authorization Process – 12/13/2018

Hello All!

The University has implemented a new Travel Authorization Process that will be 100% paper free using Adobe Sign. The go-live date was November 27, 2018. The new Travel Authorization (TA) form has changed and is easier to fill out. There are a couple of different ways to submit your TA form. Herein are the simplest instructions for you to follow:

NO TRAVEL ADVANCE REQUESTED:

- 1) The TA form can be retrieved from your home department website under Faculty & Staff → Employee Resources. Or, Paste the following to your browser: <https://eforms.fso.arizona.edu/createPdf/5/>
- 2) **You must save the new BLANK form to your desktop first before filling out the document** (suggested naming convention: **T#-your name**).
- 3) Complete the Traveler Information and Travel Details sections. Complete the Exceptions and International Travel sections, if applicable. You can leave the Travel Authorization/Funding Approval and Travel Advance Request sections blank. **Save your file again.**
- 4) Email the saved file to HMBC@email.arizona.edu. You can then delete the saved file from your desktop.
- 5) HMBC will submit and route the document for signatures electronically. You will receive a signed copy of the document by email when fully approved.

REQUESTING A TRAVEL ADVANCE:

- 1) Same as above.
- 2) Same as above.
- 3) It will **NOT** be necessary to complete the Travel Authorization/Funding Approval and Travel Advance Request sections (HMBC will do this for you). Email the saved file to HMBC@email.arizona.edu. Also include in the email the following information:
 - a. Statement requesting Travel Advance
 - b. Dollar amount of Travel Advance
 - c. Account number to charge
- 4) HMBC will submit and route the document for signatures electronically. You will receive an email to electronically sign your request for a Travel Advance (see note to Approvers below). You will also receive a signed copy of the document by email when fully approved.

Please note:

- 1) Travelers: The TA will automatically route to the Financial Services Travel Office. You do **NOT** need to print a copy of the TA. Once all approvals have been completed, you will receive an email with a copy of the finalized TA.
- 2) Approvers: You will receive a notice via email when you have a TA that needs your approval (example: request a Travel Advance for yourself or one of your students). Please be sure to click on the blue highlighted link within the email. Please follow the links within the Adobe sign document. Do not add any additional approvers or remove anyone from the routing process.

If you have any questions, or would prefer one-on-one assistance with this new process, please call or come see us at HMBC. We are here to help you in every way we can.

The HMBC Team