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# Travel & Entertainment Approvals

Resource Management & Planning

March 11, 2014

# MyTravel Approval Templates

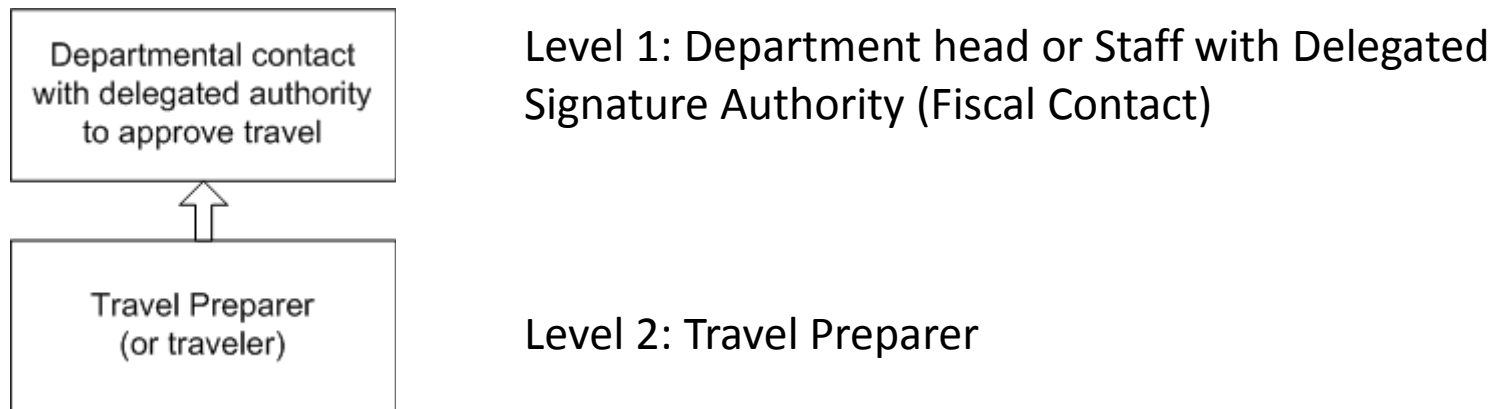
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- When you use MyTravel, each transaction goes through an approval process driven by an approval template.
- 3 travel document types
  - Going on a trip: travel preauthorization (TRP)
  - Prepayments for hotel, registration, service fees: travel invoice (TIV)
  - Cash advance: travel advance (ADV)

# Preauthorization (TRP)

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- Preauthorizing UC San Diego travel is required regardless of how expenses will be paid or reported.



# Reconciliation (TRP)

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- When you use MyTravel to report travel expenses online, the TRP template is also used to route for approval.
- If reporting expenses for a VC Direct Report, MyTravel must be re-assigned to the VC Office for Level 1 Approval.

# Reconciliation (TRP)

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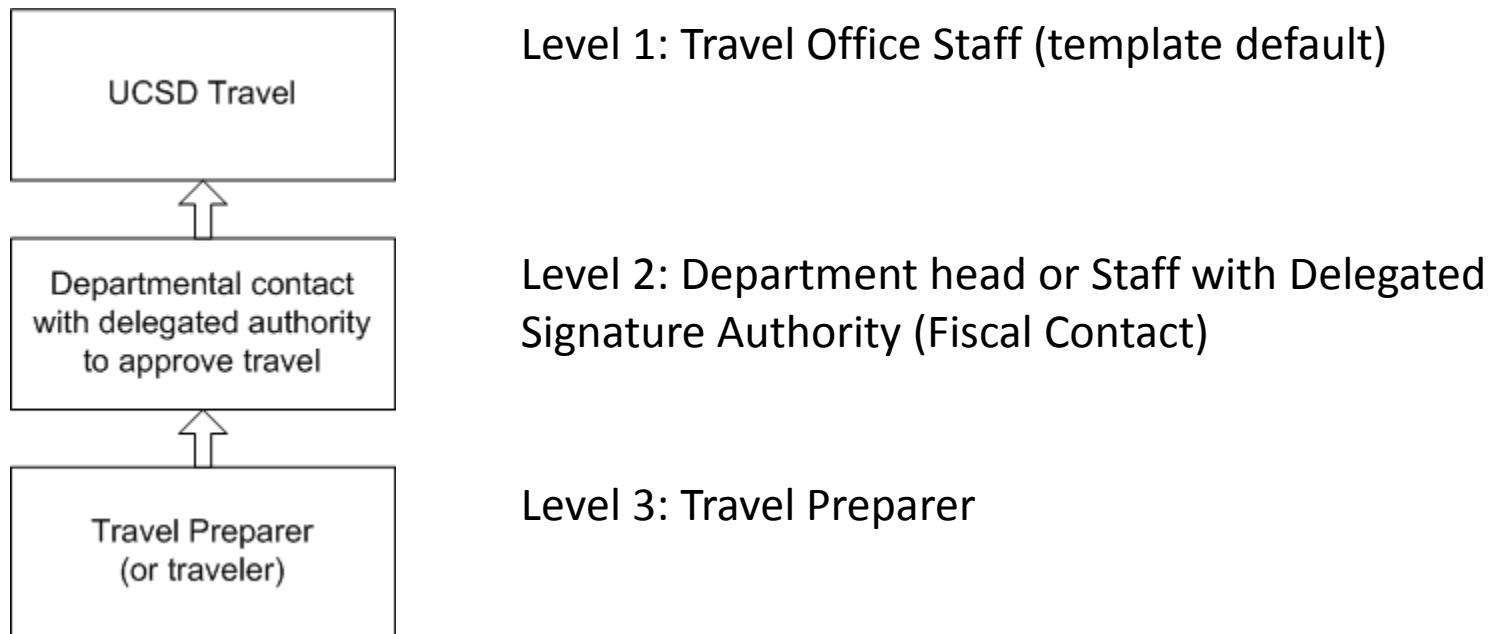
For VC Direct Report travel, VC Office user ids are added as Level 1 alternates.

1	Primary	REDDKL	LAWN, DESIREE K.	← Department Authority
	Alternate	REDNJE	EAGLE, NANCY J.	← Department Alternate
		VCRCJT	THUNSTROM, CAROL J.	↙ VC Office
		VCRGCM	MATTHEWS, GARY C.	↘ VC Office
2	Primary	REDBCM	MENDEZ, BESSIE CAROLINA	← Department Preparer

# Prepayments (TIV) & Advances(ADV)

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Applies to prepayments/advances for hotel, registration or service fees.



# Prepayments (TIV) & Advances(ADV)

For VC Direct Report travel, VC Office user ids are added as Level 2 alternates.

1	Primary	GAOXXX	TRAVEL OFFICE STAFF
2	Primary	REDDKL	LAWN, DESIREE K.
	Alternate	REDNJE	EAGLE, NANCY J.
		VCRCJT	THUNSTROM, CAROL J.
		VCRGCM	MATTHEWS, GARY C.
3	Primary	REDBCM	MENDEZ, BESSIE CAROLINA

← Department Authority

← Department Alternate

← VC Office

← Department Preparer

# RMP Specific Travel Policy

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- Estimated travel expenses > \$1,500/person requires VC pre-approval (e-mail C. Thunstrom).



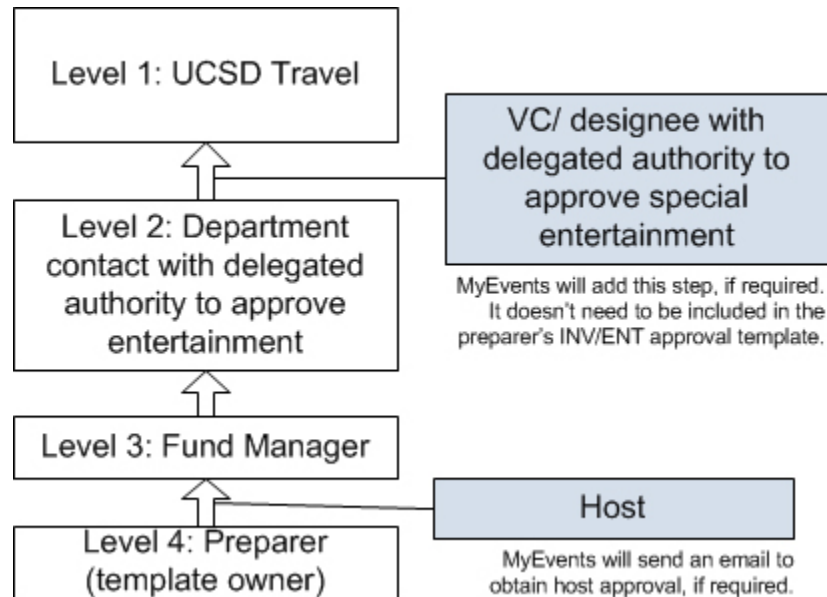
# MyEvent Approval Templates (ENT)

- Approval routing is automatic and is determined by the preparer's ENT template.
- The type of event determines to which hierarchy level(s) the document needs to be routed.

Event Type	Authority	Hierarchy Level
Business Meetings	Fund Manager	Level 3
Standard Entertainment	Unit Head	Level 2
Special Entertainment	Vice Chancellor	Automatic

# MyEvent Approval Templates (ENT)

ENT templates MUST have 4 levels.



Level 2 is skipped when not required by policy (Business Meetings).

Special (VC) authority is automatic, if required.

# MyEvent Approval Templates (ENT)

For VC Direct Reports, VC Office user ids are added as Level 3 alternates.

1	Primary	GAOXXX	TRAVEL OFFICE STAFF	
2	Primary	REDNEK	KOSSAN, NANCY E.	← Standard Entertainment
3	Primary	REDDKL	LAWN, DESIREE K.	← Department Authority
	Alternate	REDNJE	EAGLE, NANCY J.	← Department Alternate
		VCRCJT	THUNSTROM, CAROL J.	↙ VC Office
		VCRGCM	MATTHEWS, GARY C.	↘ VC Office
4	Primary	REDBCM	MENDEZ, BESSIE CAROLINA	← Department Preparer

# Delegated Entertainment Authority

- Standard Authority has been delegated to RMP Unit Heads. Authority cannot be further delegated.
- Special Authority resides with the Vice Chancellor Resource Management & Planning.

# RMP Standard Authority

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Unit	Delegated Authority
Campus Budget Office	Sylvia Lepe-Askari
Real Estate	Nancy Kossan
Policy & Records Administration	Paula Johnson
Facilities Management	Stephen Jackson
Facilities Design & Construction	Joel King
Community Safety	Orville King
Auxiliary Business Services	Robert Holden
Environment, Health & Safety	Garry Mac Pherson
Campus Planning	Brian Gregory
RMP Admin (HR, IT, Financial)	Gary Matthews

# RMP Specific Event Policy

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- Special Entertainment requires VC preapproval (e-mail C. Thunstrom)
- Units are limited to 2 employee morale and/or holiday gatherings per year.
  - Per person spend should not exceed Light Refreshment maximum (excl. venue cost).