

# Travel Management



**Bloomsburg**  
UNIVERSITY

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## Existing Travel Forms:

- Travel Approval Request (TAR) form;
- Travel Expense Report (TER) form;
- Vehicle Reservation Request form;

## New Travel Management System:

- Travel Approval Requests entered/approved via Employee Self Service (ESS)/Manager Self Service (MSS) portal;
- Travel Expense Report entered/approved via ESS/MSS portal;
- Enterprise rental use trip number to reserve and complete Vehicle Reservation Request form;
- “Insurance Purpose Only/Non-Expense” fund centers created for each division;



# Summary of Changes:

- All employee travel approval requests (TAR) and expense reports (TER) are electronic, NO PAPER;
- Approvals for travel are routed through workflow and are electronic via Manager Self Service (MSS) portal;
- TERs do not route for re-approval if they are within \$25.00 of the TAR, (\$25 variance is at the Fund Center level);
- Travel is encumbered upon approval of the travel approval request;
- Subsistence rates are calculated automatically by selecting Trip Country, Trip Region, Trip Dates and Military Times;
- Fund Center managers who are also Travelers will approve their own travel;



# Summary of Changes:

- Inclusion of scanned receipts and/or required documentation (i.e. conference itinerary);
  - Be sure to sign and date each receipt prior to scanning
- Travel Assistants will have visibility of travelers trips, however travelers must send TARs and TERs for approval;
- Ability to create Personal Value Lists;
- Payroll and Accounts Payable information now linked;
- Inclusion of provision for classes during absence in the comment section of travel approval request.

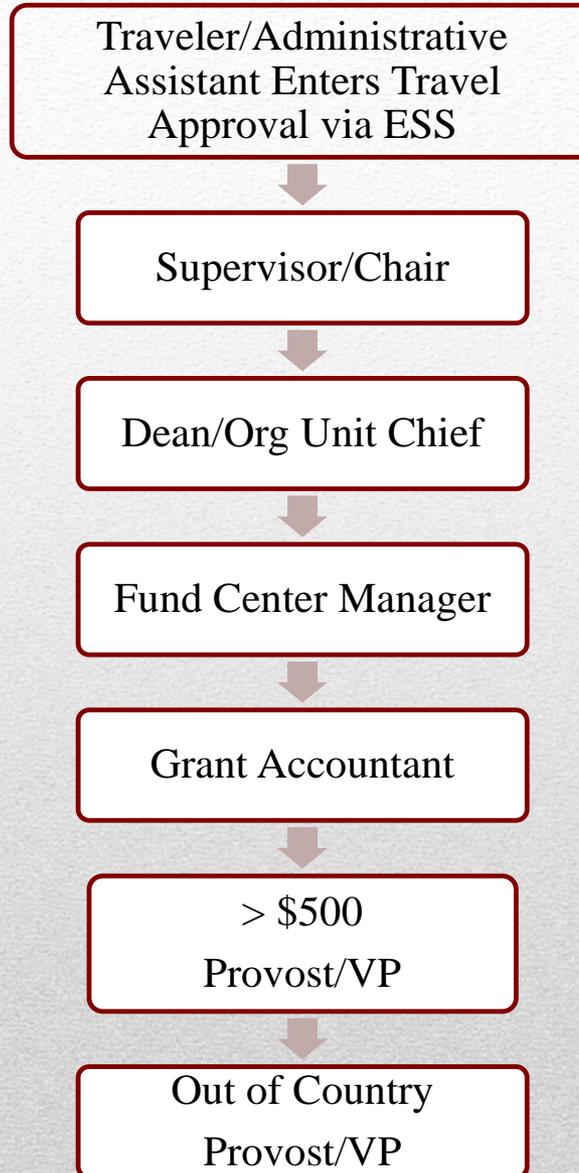


# Benefits of Travel Management System:

- Travel approval requests and expense reports can be entered anywhere through the Web via Employee Self Service (ESS) portal;
- Likewise, electronic approvals of trip requests and travel expense reports can be completed anywhere through the Web via Manager Self Service (MSS) portal;
- Travelers have visibility of where requests/expense reports are in the process;
- Budgetary commitments for travel approval requests and expense reports are automatically created;
- Attach documentation/receipts to travel approval request/expense reports for approvers to review from remote locations;
- Reportable database of travel expenses.

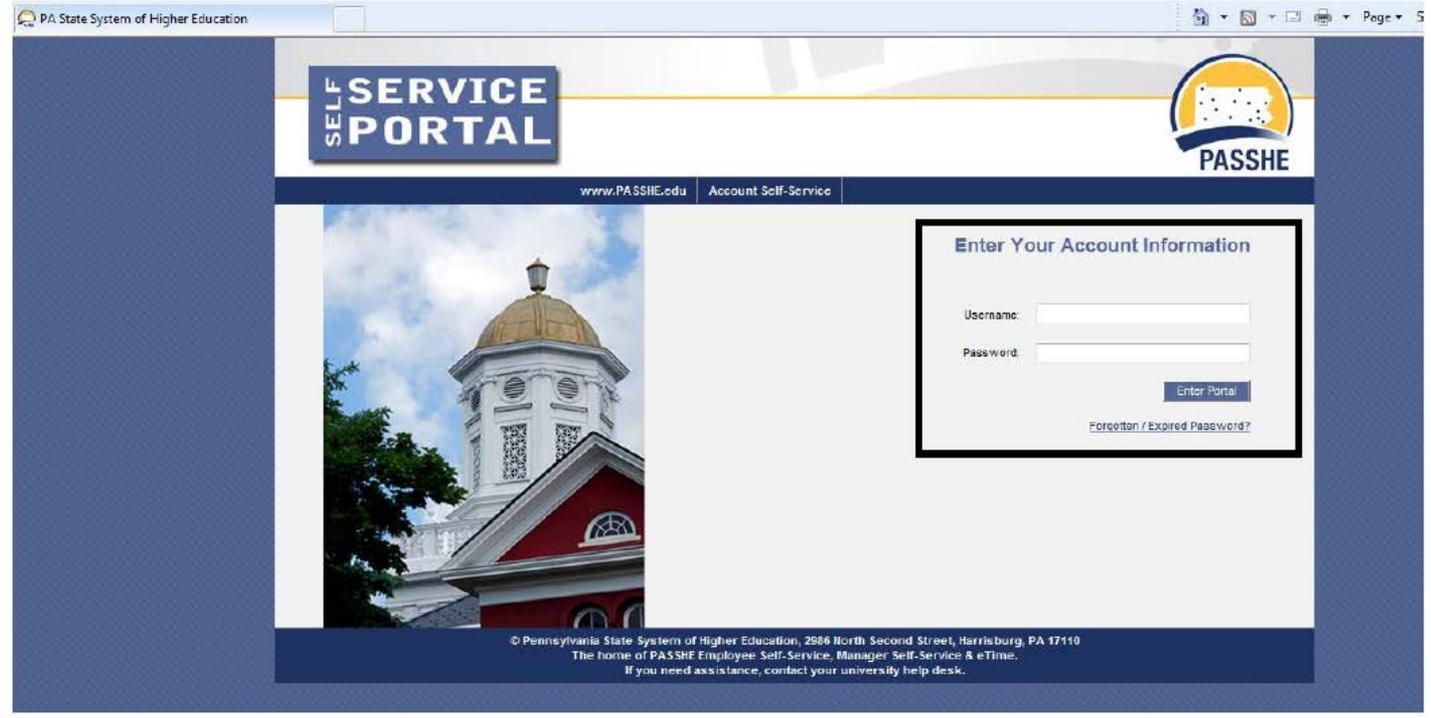


## Workflow Process:



*All Travel Requests will be entered by either the Traveler or Travel Assistant via the portal.*

Log into the portal...



The screenshot shows a web browser window displaying the PASSHE Self-Service Portal. The browser's address bar shows "PA State System of Higher Education". The page features a blue header with the text "SELF SERVICE PORTAL" on the left and the PASSHE logo on the right. Below the header, there is a navigation bar with the URL "www.PASSHE.edu" and the text "Account Self-Service". The main content area is divided into two sections: on the left, a photograph of a building with a prominent golden dome; on the right, a login form titled "Enter Your Account Information". The form includes input fields for "Username:" and "Password:", an "Enter Portal" button, and a link for "Forgot or Expired Password?". At the bottom of the page, a copyright notice reads: "© Pennsylvania State System of Higher Education, 2886 North Second Street, Harrisburg, PA 17110. The home of PASSHE Employee Self-Service, Manager Self-Service & eTime. If you need assistance, contact your university help desk."



From the ESS tab, click on either of the 2 provided Travel Management links.



**SELF SERVICE PORTAL** Pennsylvania State System of Higher Education  
Welcome Nicole Richards

Home | **Employee Self-Service** | Manager Self-Service | SAS Internal Tools

Overview | Personal Information | Benefits | Leave & Time | Payroll | **Travel Management** | My First Days | Help Documents

Overview

**Welcome Nicole to Employee Self-Service!**

**Areas of Employee Self-Service**

**Personal Information**  
Display your personal data, addresses, and bank information. Here you can also manage your ethnicity information.

**Benefits**  
Display your benefits participation information and access the online benefits enrollment system.

**Leave & Time**  
Within this section of Employee Self-Service you may view your leave balances and a complete record of all absences you have submitted to date. If you have an Employee Leave Request system, you may access it here as well.

**Payroll**  
Access online copies of your printed pay statements, manage your W-4 withholding, view/change your W-2 election, and view your online W-2 form, if you have one.

**Travel Management**  
This area of ESS provides employees with functions to create and manage travel requests and expense reports.



# How To:

- Enter Travel Approval Request;
  - Insurance Purpose Only/Non expense Travel Approval;
  - Search for Trip Region;
  - View Status of Travel request or report;
  - Create Favorites;
- Enter Travel Expense Report against Request;
  - Reimbursement Prior to trip (Prepaid Expenses), for example airfare or conference fees;
- Approve Travel Approval Request/Travel Expense Report;
- Daily Travel with more than one destination;



# Common Issues:

- If approval log is not visible, traveler has not clicked “save and send for approval”
- When creating expense report and travel dates have passed, it will require you to delete the estimated costs
- Prepaid Conference registration – adjust the estm – do not delete
- When selecting third party vendors, make sure to scroll down the list to “X: pd to vendor”
- Link expense reports to existing travel requests
- Some locations – Montoursville – may not be there; search for county
- For admins to review first, set up rule to forward emails
- Remember when attaching receipts, to initial and date
- When an admin creates or modifies a travel document, the traveler is not automatically notified

# Common Problems:

Sample 1:

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report	A
1000003321	07/20/2016	07/20/2016	[REDACTED]	[REDACTED]	In Processing	Request Open	<a href="#">Add</a>	Create	
1000003290	04/28/2016	04/28/2016	[REDACTED]	[REDACTED]	In Processing	Request Open	<a href="#">Add</a>	Create	

Sample 2:

**Destination**

\* Trip Country: Standard Conus Rate, USA    Trip Region: PA/HK    Harrisburg, PA

\* Destination: 319 North Front Street, Harrisburg, PA 17101

Sample 2:

