

# FMS – Travel Authorization (TA) & Professional Growth (PG) Application

## Travel

Maricopa requires employees to complete a Travel Authorization in the Financial Management System (FMS) for the following:

- In-County travel with expenses.
- All Out-of-County travel.
- All Out-of-State travel.
- All Group travel.
- All Student travel.
- All International travel.
  - International Travel requires an [International Travel Proposal Form](#).

## In-County No Expense Travel

The only travel situation in which employees are not required to submit a Travel Authorization is for an In-County activity with no expenses.

## Penny Travel Authorizations

Penny Travel Authorizations or “Penny TAs,” are Out-of-County or Out-of-State Travel Authorizations that do not have Maricopa-related expenses. A third party is paying for the expenses related to that travel or it’s free of charge.

FMS cannot process a TA with no financial value. You must enter \$.01 as your Registration expense amount.

## Before You Travel!

Travel Authorizations must be **approved** before you travel and/or participate in your activity. You **cannot backdate** a Travel Authorization.

## Professional Growth (PG)

The Travel Authorization form is also used as the Professional Growth (PG) application for employees. PG requests are submitted, approved, and processed with a Travel Authorization in FMS.

Professional Growth funded activities include:

- ✓ Conferences
- ✓ Training sessions, workshops, & seminars
- ✓ Online training courses and subscriptions
- ✓ Certification Exams
- ✓ Educational Reimbursement (Tuition, Books, Exams)

For Professional Growth (PG) information, please visit the Professional Growth [website](#).

## Important Information!

The financial risk transfers from MCCCCD to the employee if s/he utilizes their personal funds to pay for their request *prior* to being approved.

MCCCCD is under no obligation to approve the TA even if expenses have already been incurred by the employee. This includes Professional Growth travel!

Travelers may not – under any circumstance – use a district-issued pro card to pay for travel that is not yet authorized!

## Helpful Information

Before starting your travel process, please review [Travel Administrative Regulation 1.15](#).

Also please view the [Travel Process video](#). (If you get a login window, simply click cancel.)

# Create a Travel Authorization

1. Log into [FMS](#) using your MEID and password.
2. Click the NavBar and click Navigator.
3. **Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify**
4. On the Travel Authorization page, click Add.

The screenshot shows the 'Travel Authorization' page with a search bar for 'Empl ID' and an 'Add' button at the bottom, which is highlighted with a red box.

- If you are logging in for the **first time** in FMS, you will have to wait 24 hours to get access to create a Travel Authorization.
5. Click in Business Purpose, and select the appropriate option.

The screenshot shows a dropdown menu with the following options: Business Meeting, Conference, Conference Speaker, Education Reimbursement, Group Travel, KJZZ Fronteras Reports, Recruiting, Site Visit, Study Abroad, Theater/Official Function, Time Away Approval, and Training / Workshop.

Allowable "Business Purposes" for PG funding:

- Conference
- Conference Speaker
- Education Reimbursement
- Training/Workshop

**Important!** All other "Business Purposes" are **not** eligible for Professional Growth funding!

6. In Description, enter the name of your activity.
  - Ex: Dev Learn Conference 2019.
  - Abbreviate words if necessary to fit into the field. (30 characters maximum).

The screenshot shows the 'Create Travel Authorization' form. The '\*Business Purpose' dropdown is set to 'Conference'. The '\*Description' field is highlighted with a red box.

7. In Default Location, click the Look Up icon.

The screenshot shows the 'Create Travel Authorization' form. The '\*Description' field contains 'Dev Learn Conference 2019'. The 'Default Location' field has a 'Look Up' icon highlighted with a red box.

8. Click the Advanced Lookup link.

The screenshot shows the 'Look Up Default Location' dialog. The 'Search by' dropdown is set to 'Expense Location'. The 'Advanced Lookup' button is highlighted with a red box.

9. In the Description field, click and select *contains*; then enter the city's name in the second field; then click Look Up.

The screenshot shows the 'Look Up Default Location' dialog. The 'Description' dropdown is set to 'contains'. The second input field is highlighted with a red box. The 'Look Up' button is also highlighted with a red box.

- Most Valley cities like Tempe, Mesa, Chandler, etc., are not in the system. Instead, enter Phoenix and use the **Phoenix/Scottsdale** option.
  - New York is included in "Manhattan and five boroughs" so search for Manhattan.
10. Select your city from the Search Results.
    - If your city is not listed, see next page.

- If your location is not listed, please contact your Fiscal Office for the nearest city.
  - The actual location will need to be included in the Description field of your Registration expense line.

11. In Date From and Date To, use the Calendars to enter the travel date(s).

- If appropriate, include personal travel dates in this date range and include that information in your Notes.

The screenshot shows a form with the following elements:
 

- A search bar for 'Default Location' containing the text 'Las Vegas' and a magnifying glass icon.
- Two date selection fields: '\*Date From' and '\*Date To'. Each field has a small calendar icon to its right, which is highlighted with a red square.
- An 'Attachments' link with a plus sign and a paperclip icon below the date fields.

- **Note:** Maricopa does not pay for any expenses associated with personal travel days.

## Expenses

The next column describes the more common travel expenses. Keep in mind that the expenses described here are not a complete list of expenses that can be included in your request.

- Check [Travel Administrative Regulation 1.15](#) for specific details on expenses.
- Include all of the expenses associated with this travel authorization request.
- Do **not** include expenses associated with personal travel days.
- All of your expenses require a quote, *except Per Diem Meals*.
- Quotes must be in pdf format.

## Common Expenses

**Airfare:** Find the lowest airfare quote possible. You may increase it by 25% to allow for airfare increases between finding the quote and actual purchase (*25% increase is optional*).

- Be sure to include in the Description of this expense that you increased it by 25%.

**Baggage:** Maricopa will pay for one standard checked bag each way.

**Car Rental:** According to [Travel Administrative Regulation 1.15.6](#): "Rented vehicles may be authorized when more economical means of travel are not available. Use of rented automobiles shall be limited to instances where it is to the advantage of the College/District and not for the personal convenience of the traveler." Justification in the expense description is required.

### Ground Transportation:

Taxi/Shuttle/Bus/Uber/Lyft. Enter the estimated amount for the round trip transportation.

- Tips are **not** paid or reimbursed by MCCCCD.
- Claims over \$25 require a receipt.
- Purpose for transportation must be identified.

**Lodging:** Hotel expenses are calculated based on the number of nights and nightly rate entered. Make sure to include taxes and all applicable fees!

- Contact the hotel for the daily resort and tax fees to get an accurate quote.
- Lodging is only permissible if you will not be able to return home or duty post by 9:00pm.
- Lodging must be at a commercial establishment.

**Mileage:** When driving your own vehicle for business-related travel in-county, out-of-county, or out-of-state activities, the expense amount is auto-calculated by FMS after you enter the total number of miles in the expense line.

- Be sure you have completed the MCCCCD Driver Training Program.
- PG does not pay for in-county mileage associated with PG activities.

**Mileage vs Airfare:** If you decide to drive, rather than fly, to an out-of-state activity, Maricopa will reimburse the amount that is the lesser of the two.

- Enter **one** expense line for Mileage.
- Enter the number of miles that equates to the quote with the lesser amount.
- All details clarifying the method of transportation (driving) and the cost are required in the Description field.
- You will attach quotes for **both** mileage and airfare to prove which is the lesser of the two.

**Parking:** Maricopa will reimburse you for your parking expenses. This includes:

- Airport Long-term economy parking.
- In-County required parking.
- Parking at the conference hotel.

**Registration:** Use this expense type for any out-of-county and out-of-state registration.

**Registration In-County:** Use this expense for any activities that take place in Maricopa County.

Use this expense for self-paced training such as: online training, training subscriptions, and certification exam preparation materials.

- **Residential Faculty Note:** Faculty working towards salary advancement **do not** include the Registration expense type!

**Per Diems:** Add a Per Diem Meal expense line for every business travel day.

The expense amount will populate with the city's per diem rate of the city you entered in Default Location.

- Add Per Diem Meal expense lines last!
- Use the Per Diem Meal expense type.
- **Always** select the "Empl Reimbursed" payment type.
- Do **not** use the "do not include" meal options.
- Do **not** change the default Per Diem amount.
- You will deduct meals you are not entitled to in your Expense Report.

# Add Your Projected Expenses

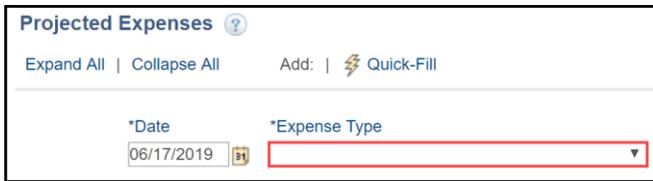
Complete the following steps for **each** of your projected expenses. There are bulleted notes for some of the specific expenses.

1. In the Projected Expenses section, in Date, click the Calendar to select your date.



The screenshot shows the 'Projected Expenses' header with 'Expand All', 'Collapse All', 'Add:', and 'Quick-Fill' options. Below, there are two input fields: '\*Date' and '\*Expense Type'. The calendar icon next to the '\*Date' field is highlighted with a red box.

- Date must be within the date range you entered on *page 3, step 11*.
2. Click in Expense Type, and select an expense.



The screenshot shows the 'Projected Expenses' header. Below, the '\*Date' field contains '06/17/2019' and the '\*Expense Type' dropdown menu is highlighted with a red box.

3. In Description field, click the expand arrow.



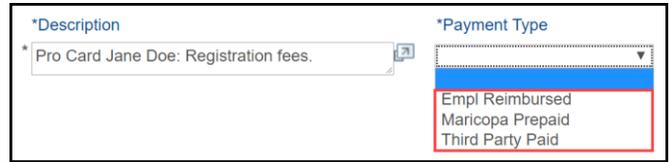
The screenshot shows the '\*Expense Type' dropdown menu set to 'Registration' and the '\*Description' field with an expand arrow icon highlighted by a red box.

4. If a Maricopa Pro Card or Purchase Order (PO) will pay the expense, you must indicate that **first** in your description.

- For Pro Card: you **must** include the card holder's name (ex: Pro Card Jane Doe).
- For Purchase Order: enter "Will be paid by Purchase Order."
- After entering this information **first**, continue to enter specific expense details.

5. Click Return to return to Travel Authorization.

6. Click in Payment Type, and select accordingly:

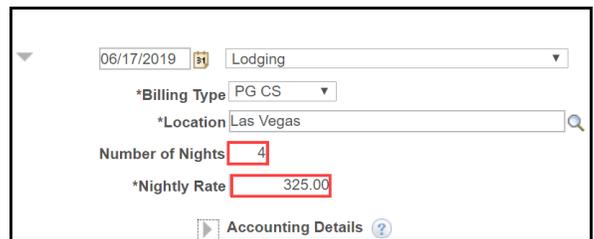


The screenshot shows the '\*Payment Type' dropdown menu with three options: 'Empl Reimbursed', 'Maricopa Prepaid', and 'Third Party Paid'. 'Empl Reimbursed' is highlighted with a red box.

- **Empl Reimbursed** – you are using your own money/credit card to pay for this expense. Upon return of your travel, and submitting your completed Expense Report, and after approval, this expense will be reimbursed.
- **Maricopa Prepaid** – you are using a Maricopa Pro Card or a Maricopa Purchase Order to pay for this expense.
- **Third Party Paid** – This payment type is reserved for Non-PG travel when **NO** MCCCDC funds will be used. DO NOT select this Payment Type for PG activity.

7. In Amount, enter the expense amount.

- For Lodging, be sure to enter in the number of nights and nightly rate including taxes and required fees.
- Simply divide the total hotel costs by the number of nights to get a nightly rate.



The screenshot shows the 'Lodging' expense form with the following fields: '\*Date' (06/17/2019), '\*Billing Type' (PG CS), '\*Location' (Las Vegas), 'Number of Nights' (4), and '\*Nightly Rate' (325.00). The 'Number of Nights' and '\*Nightly Rate' fields are highlighted with red boxes.

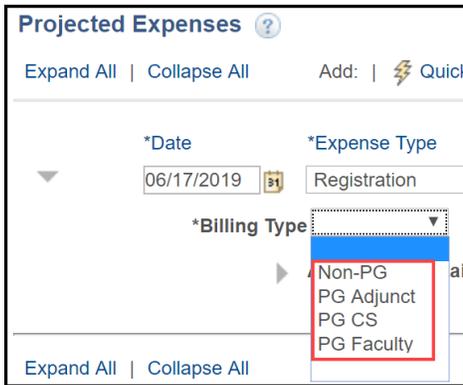
- The Amount field for the Lodging expense will auto-calculate as soon as you complete the line, and Save for Later.



The screenshot shows the 'Maricopa Prepaid' expense form with the 'Amount' field set to '1,300.00' and 'USD'. The 'Amount' field is highlighted with a red box.

**Continue on next page for Billing Type...**

- 8. **REQUIRED!** Click in Billing Type and select accordingly:



- If requesting Professional Growth (PG) funds to pay the expense, select your PG type; then skip to step 11:

**PG CS** (Classified Staff) – For *former* M&O, Crafts, Safety, PSA and MAT, MAT equivalent Specially Funded and Athletic Specialist employees.

- **Important!** MAT equivalent Specially Funded employees will then have to follow *step 9* for additional steps.

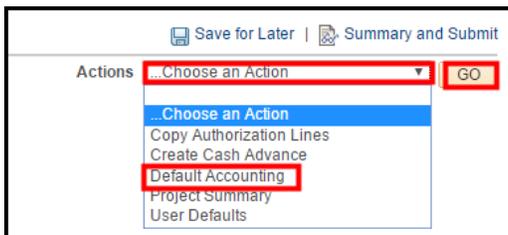
**PG Adjunct** – Adjunct Faculty, and OYO/OSO.

**PG Faculty** – For Residential Faculty.

- If you are *not* using Professional Growth funds to pay the expense, select **Non-PG**; then skip to step 10 for additional steps.

- 9. For **MAT equivalent Specially Funded** employees requesting PG funds, follow the next steps directly below.

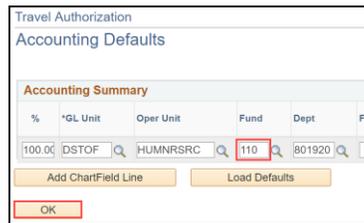
In the upper-right corner, click in Actions, and select **Default Accounting**; then click Go.



- In Accounting Summary, *most* of your department budget populates.



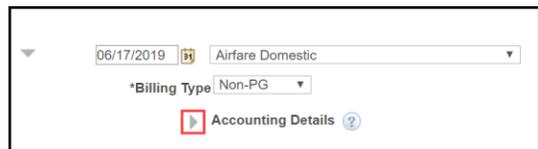
- **Important!** Since requesting PG funds, you must change the Fund field to **110**; then click OK to return to your Travel Authorization.



- If any expense will be listed as Non-PG, then follow step 10 below, otherwise skip to *step 11*.

- 10. **Important!** If you selected a *PG* Billing Type, the Function in your Accounting Details will auto-populate. Do not Change the Function field.

If you selected *Non-PG* as your Billing Type for an Expense, click the expand arrow for Accounting Details to select your required Function. Follow the steps below.



- In **Function**, click the Look Up icon, and select the Function that *relates to your Travel Authorization activity*.



**Function descriptions are on next page.**

**Academic Support:** Expenses that indirectly help carry out the primary functions of instruction, research, and public service. (ex: libraries, computer labs that are not part of instruction, galleries, dental clinics, audio visual, academic deans, department chairs who don't teach, separately budgeted curriculum development)

**Instruction:** Expenses directly related to teaching – both credit and noncredit courses. (ex: Faculty, department chairs who also teach, teaching supplies, and IT including computer labs directly related to classroom)

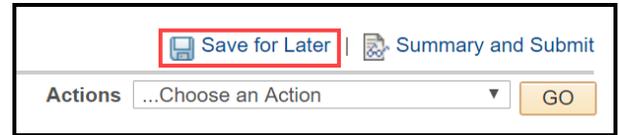
**Institutional Support:** Expense related to day to day operations at the Colleges and District Office. (ex: legal, fiscal operations, HR, central IT, software licensing, safety, security, insurance, mail and copy services, CEC - executive leadership, and Governing Board)

**Operation/Maintenance of Plant:** Expense related to buildings. (ex: physical plant administration, building maintenance, custodial, utilities, major repairs and renovations).

**Public Service:** Expenses related to activities to benefit external parties. (ex: radio stations, community services, conferences, public lectures).

**Student Services:** Activities centered around students. (ex: enrollment services, student activities, counseling, veterans' services, student organizations, cultural events, athletics, and student newspaper).

11. In the upper-right corner, click Save for Later.



- You now have an Authorization ID number located in the upper-right corner.

12. To add additional Expense lines, click the + plus sign at the end of the last expense row.



13. Repeat steps 1-10 (*some steps may not apply*) for the additional expenses.

14. Scroll to the top, and click Save for Later.

15. If adding Per Diem Meal expense line(s), please be sure to add them **last**.

16. After adding your first Per Diem Meal expense line, see the "Add Additional Per Diem Meals" section on the next page for a copy shortcut.

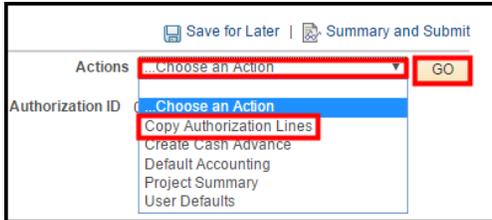
## Delete an Expense

- To the right of the expense row, click the - sign.
- Click OK to confirm.
- Click Save for Later.

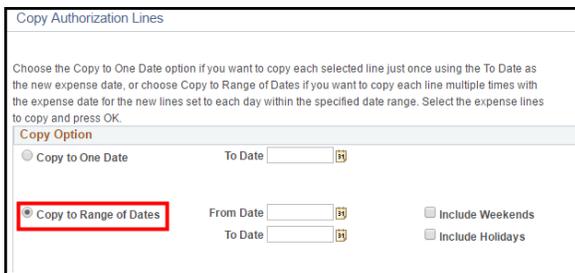
# Add Additional Per Diem Meals

When traveling multiple days for your business trip/activity, a Per Diem Meal expense line is required for each day.

1. After adding your first Per Diem Meal line, scroll to the top of your Travel Authorization, click in Actions, and select **Copy Authorization Lines**; then click **Go**.



2. Click Copy to Range of Dates.



3. In the From and To Dates, use the Calendar to select the date range for the **remaining** travel dates.
  - Do not include the first date previously added on the first Per Diem Meal expense line.
4. Click in the Per Diem Meal checkbox; click OK.

Select	Expense Type	Expense Date	Amount Spent	Transaction
<input type="checkbox"/>	Registration	06/17/2019	225.00	USD
<input type="checkbox"/>	Lodging	06/17/2019	1300.00	USD
<input type="checkbox"/>	Airfare Domestic	06/17/2019	298.00	USD
<input checked="" type="checkbox"/>	Per Diem Meal	06/17/2019	51.00	USD

- **Important!** If you selected *Non-PG* as your Billing Type, be sure to follow *step 10* on page 6 to add your required Function!
5. In the upper-right corner, click Save for Later.

# Required Documents

**All expenses, except Per Diems, require a quote.** These documents must be in pdf format.

**Conference Agenda/Schedule is required for all Conference Travel Authorizations.**

**Professional Growth (PG):** Please check with your PG representative, or the [PG website](#), for any employee group-specific requirements.

**International Travel:** All International Travel requires the [International Travel Proposal Form](#).

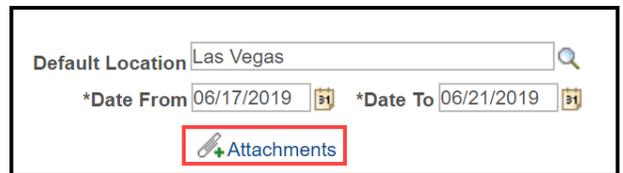
Please check [Travel Administrative Regulation 1.15](#) for more travel information.

# Attach Required Documents

All required documents **must** be in pdf format.

Documents must be uploaded individually.

1. At the top of your screen, underneath the date fields, click the Attachments link.



2. Click Add Attachment.
3. Click Choose File (Chrome) or Browse (IE).
4. Locate and double-click your document.
5. Click Upload.
6. In Description, enter a description of your attached document.

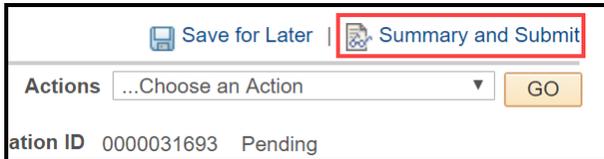
File Name	Description	User	Name
DevLearn_2015_Registration_Information.pdf			

7. To add another document, repeat steps 2-6.
8. When finished, click OK.
9. Click Save for Later.

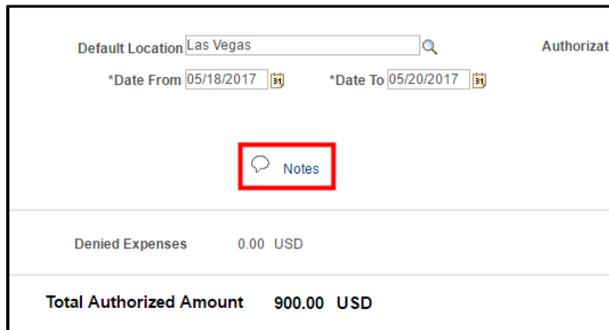
# Required! Entering Notes

Entering Notes in your Travel Authorization is a **requirement** to justify the purpose of your request **before** submitting your Travel Authorization for approval.

1. In the upper-right corner, click Summary and Submit.



2. Click the Notes icon or link.

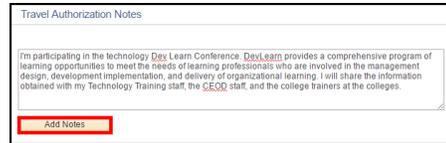


3. Describe the business purpose of the request, and how participating in the mentioned activity will benefit MCCCD, improve your performance at your present job, prepare you for greater opportunities within MCCCD, and support your professional development.

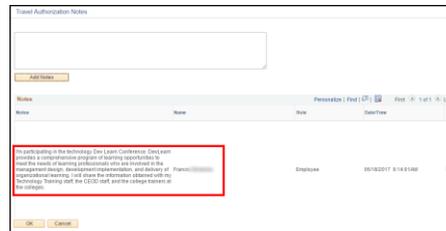


- Include any clarifying information regarding any expenses, personal travel days, etc.

4. When finished with your Notes, click Add Notes.



- Your Notes are now added to your Travel Authorization. See the Notes section below the Notes field.
- To edit your Notes, (fix typos, add missing information, etc.), first highlight and copy your text, then delete the line by clicking the – sign to the right, and re-enter your notes.



5. Click OK.

6. In the upper-right corner, click Save for Later.

## Submit Travel Authorization

1. In the upper-right corner, click Summary and Submit.
2. To confirm that your travel expenses comply with our Travel Administrative Reg 1.15, click the check mark box at the bottom.



3. Click the Submit Travel Authorization button.
4. Click OK to confirm.

  - Travel Authorization is submitted for approval.



5. Click Sign Out in the upper-right corner.

# View Status and Track a Travel Authorization

Viewing and tracking your Travel Authorization will help you find where in the approval hierarchy your Travel Authorization resides. These steps can also help you when you need to notify the current approver to "Send Back" your Travel Authorization for revision (if necessary).

1. Log into FMS using your MEID and password.
2. Click the NavBar and click Navigator.
3. **Employee Self-Service > Travel and Expenses > Travel Authorizations > View**
4. Click Search.

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values

Find an Existing Value

Search Criteria

Search by: Authorization ID begins with

Search Advanced Search

- If you only have one Travel Authorization, it will automatically open.
- If you have more than one Travel Authorization, a list of all your Travel Authorizations displays. Click one to view.
- Your Travel Authorization summary displays.

Travel Authorization

Business Purpose: Conference Default Location: Las Vegas Authorization ID: 0000017006 Approvals in Process

Description: ConLearn 2017 Conference Date From: 10/23/2017 Date To: 10/27/2017 Created: 06/13/2017 France C... Last Updated: 06/14/2017 Paula C...

Totals: Projected Expenses (8 Lines): 1,838.00 USD Desired Expenses: 0.00 USD Total Authorized Amount: 1,838.00 USD

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Francis K...	06/13/2017 11:38:56AM
Approved	Supervisor	Paula C...	06/14/2017 2:41:38PM

5. At the top, in the upper-right corner, view the approval status.

Travel Authorization

Approvals in Process

6. Scroll to the bottom, in Approval History, view the Approval History timeline.

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Francis K...	06/13/2017 11:38:56AM
Approved	Supervisor	Paula C...	06/14/2017 2:41:38PM

- If the timeline displays a gray logo with the word "(Pooled)," then the Travel Authorization has yet to be reviewed and approved by that department.

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Francis K...	06/13/2017 11:38:56AM
Approved	Supervisor	Paula C...	06/14/2017 2:41:38PM

- If you need the Travel Authorization to be "Sent Back" for your revision, contact that department that is listed as "Pooled" to Send Back your Travel Authorization.
- A fully approved Travel Authorization will display all logos in the timeline in color and you will receive an email that your Travel Authorization has been approved.

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Francis K...	06/13/2017 9:32:17AM
Approved	Supervisor	Paula Connors	06/13/2017 9:58:44AM
Auto Approved	Department	Paula Connors	06/13/2017 9:58:45AM
Approved	Fiscal	Sarah Hall	06/13/2017 10:07:27AM

7. When finished, click Sign Out.

## Modify a Travel Authorization

You can **only** modify a Travel Authorization if you have **not** submitted it for approval, **or** if it has been **“sent back”** to you for revision.

When you resubmit the travel authorization, it will go through the **entire** approval process again.

1. Click the NavBar and click Navigator.
2. **Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify**
3. On the Travel Authorization page, click the Find an Existing Value tab, and click Search.

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a full search.

**Find an Existing Value** Add a New Value

Search Criteria

Search by: Authorization ID begins with

Search Advanced Search

4. Click the Travel Authorization ID to modify.

Search Results

View All

Authorization ID	Description	Name	Empl ID	Status	Creation Date
0000015393	Test TA	Francis 150	Francis 150	Pending	04/21/2017
0000015387	Dev Learn 2017 Conference	Francis 150	Francis 150	Pending	04/19/2017
0000015379	Technology Workshop	Francis 150	Francis 150	Pending	04/14/2017

5. If “Sent Back” for revision, click the message link to view comments from your approver; click Return when finished reading comments.

Modify Travel Authorization

Francis

Sent Back For Revision By: Connors,Paula

Please update your travel authorization to include all exp

\*Business Purpose Training / Workshop Default Location Las Vegas

\*Description Test TA \*Date From 04/26/2017 \*Date

6. Make your changes where appropriate.
7. Click Save for Later, then click Summary and Submit.
8. When re-submitting, click the checkmark box to certify your expenses comply with expense policy; then click Submit Travel Authorization.
9. Click OK to confirm.

## Withdraw a Travel Authorization

If your Travel Authorization is no longer needed, or you missed attaching supporting documents after you have submitted your TA, you can withdraw your TA at any time **before** it is approved by the last approver which is the College Fiscal Office. *If the Fiscal Office has approved your TA, contact them directly for further instructions.*

First, View the Status of your TA by following the steps on page 10 to confirm that College Fiscal has NOT approved it. If College Fiscal has NOT approved your TA, you can proceed with the steps below to withdraw your TA.

1. Click the NavBar and click Navigator.
2. **Employee Self-Service > Travel and Expenses > Travel Authorizations > View**
3. Click the Search button.
4. Click the Authorization ID link of the TA you wish to withdraw.
  - **Note:** If you only have one TA it'll open automatically.
5. Below the Total Authorized Amount, click the Withdraw Travel Authorization button.

Total Authorized Amount 1,660.00 USD

I certify that the expense claimed comply with Administrative Regulations 1.15 (Travel) and 1.18 (Gifts, Gratuities and Unrelated Compensation, including any Honoraria received).

Submit Travel Authorization Withdraw Travel Authorization Submitted On: 09/25/2018 Submitted By: Francis Klimentko

- **Note:** Your TA has now been withdrawn from the approvers' queue.
6. When finished, Sign Out.