Completing a Travel Claim
1. To complete a Travel Claim form, click on the appropriate sticker.
2. Complete the data entry to all applicable fields. Please note that bolded fields are required. If a field is not applicable, enter a zero (0) or N/A.
3. Click on the add attachment link in the Total Expenses box to use the pop up to attach any required documentation and/or scanned receipts. Accounts Payable will pay from the scanned receipts; therefore, the user is required to hold the originals for a period of 3 years. If the user cannot produce the receipts when asked, they will be asked to reimburse the College.
4. After completing the form, select Add and go to Cart from the drop down box at the top, right hand corner.
5. Click Go.
6. Once the cart is open:
   A. Shoppers click the Assign Cart button because they cannot enter Accounting Information. This is the Shopper’s last step.
   B. Requestors click Proceed to Checkout.
7. After proceeding to checkout, click the edit button to open the Ship To address.
8. Enter the name of the individual traveling in the Contact Name field.
9. Click Save.
10. After selecting the Accounting Codes tab on the task bar, click on the edit button to open the Accounting Codes box.
11. Click Select from profile values under Index to select the appropriate code. Notice the Fund, Organization, and Program codes auto-populate.
12. Click Select from all values under Account to search for the correct account code.
13. Use the search box to search by a value (ex. 73100) or a description (ex. Travel).
14. Click Save.
15. Once the task bar has all green checkmarks, click Submit Requisition.
16. The Submissions Confirmation page will appear with important information including: the Requisition Number, Quick View for a printable view of the request, and the Approvals tab to view the workflow the requisition has entered.
NOTE: The approval process for the Travel Claim ends in the Accounts Payable department for final approval.