



## Electronic Workflow For Travel and Expense

**Begins today, Tuesday, November 1, 2016**

### As a traveler, how does electronic workflow affect me?

- All travelers (or their selected delegate) will be required to log into UTShare/PeopleSoft to certify their trip expenses
- Approvals and documentation review are done in UTShare/PeopleSoft (PS)
- All supporting documents are scanned and attached by the creator
- Status of expense reports can be tracked in PeopleSoft to determine where they are in the process

### I have never logged into UTShare/PeopleSoft. Help!

- Traveler/employee will have the option to delegate the certification of expenses in PS to another department employee
- Traveler/employee coordinates with department to complete the Travel & Expense Workflow Delegation form: [Travel & Expense Workflow Delegation Form](#)
- If traveler/employee decides to delegate the certification of expenses, the Travel Reimbursement Settlement Form (TRS) form is required and must be signed by the employee for each trip to document traveler expense certification.
- Travelers interested in learning how to certify their expenses in PeopleSoft should take the online Expense Report training:
  - Expense Report Workflow (PS0308)

### Is anything else changing?

**Yes**, in addition to the implementation of workflow, there are new guidelines regarding the timely submission of expense reports. Effective, today, November 1, the new deadlines are:

- Expense Reports should be finalized and submitted to DTS within 30 days from travel end (or expense occurrence)
- 60 days from travel end – Expense report is past due; will be reimbursed with notification to department that the item was considered past due
- 120 days from travel end – Will be reimbursed **but** trip total will be considered taxable income to employee

Read the full details of Travel and Expense Workflow [here](#).

## Who should I contact for additional questions?

### Travel & Expense Workflow Business Process

- **Disbursements & Travel Services contact information:**
  - Send email to DTS at: [disbursements.travel@utsa.edu](mailto:disbursements.travel@utsa.edu)
  - Main line ext. 4213
  - [DTS Contacts](#)

### UTSA Travel & Expense Workflow Delegation Form

- **PeopleSoft Support and Sustainment Center Contact Information:**
  - Send email to SPOC at: [spoc@utsa.edu](mailto:spoc@utsa.edu)
  - Create a [SPOC](#) ticket to attach UTSA Travel and Expense Workflow Delegation Form
  - Main line ext. 7762