



Miami-Dade County

Travel Authorization Job Aid

Version 1.0

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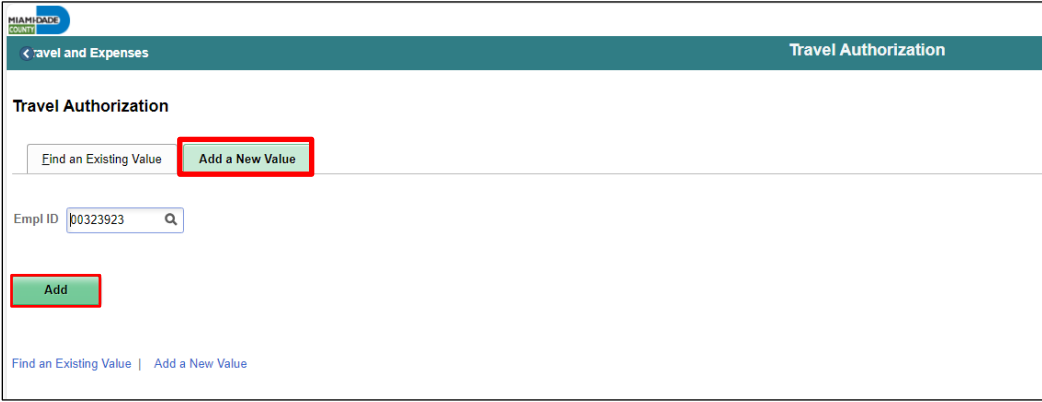
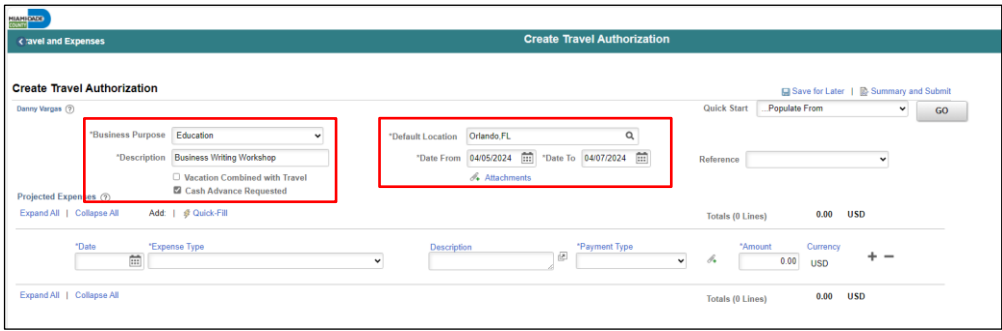
PURPOSE..... 2

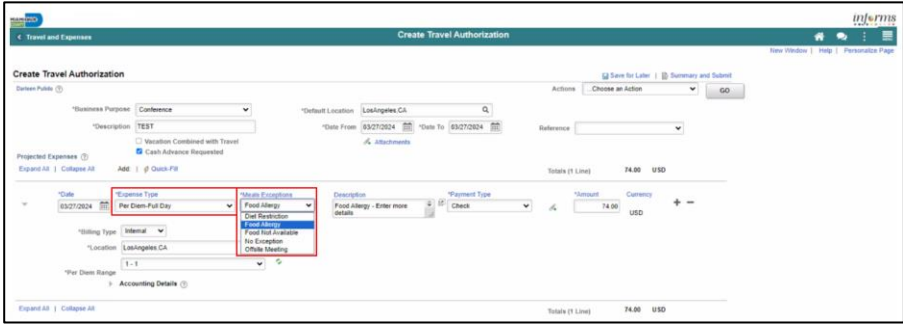
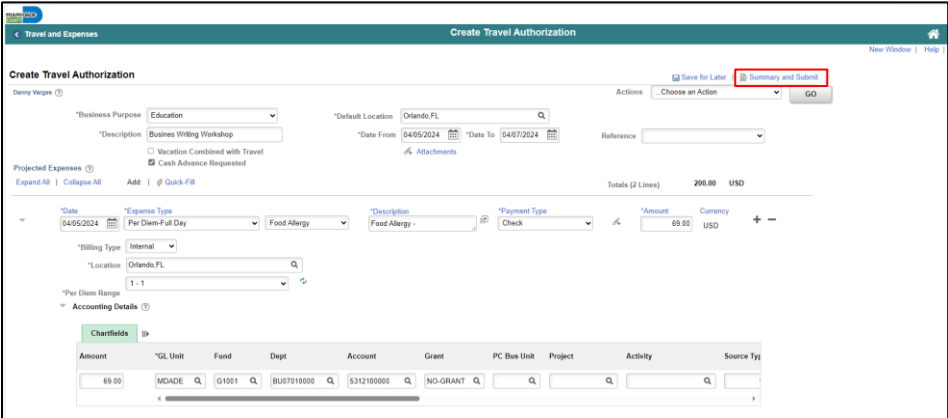
CREATE A TRAVEL AUTHORIZATION 3

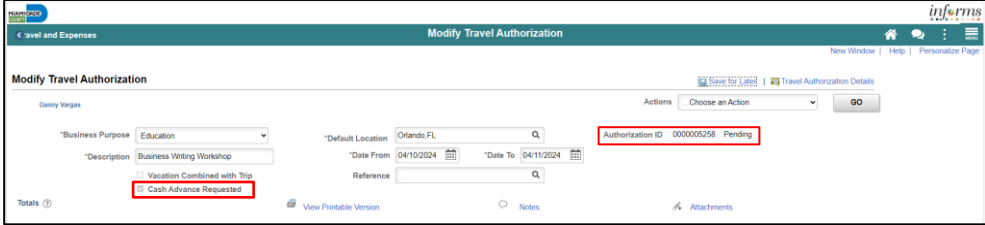
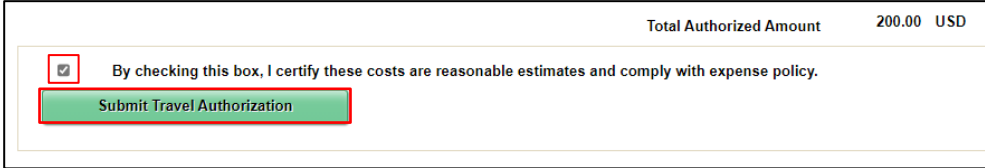
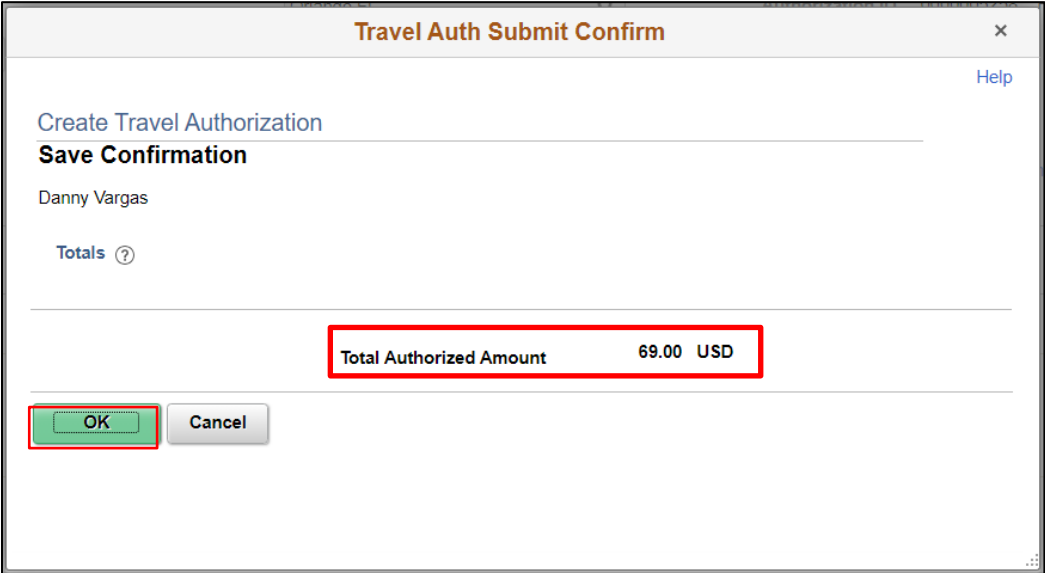
PURPOSE

This document provides instructions on how to create a travel authorization. This document is for all employees.

CREATE A TRAVEL AUTHORIZATION

Step	Action
1.	Navigation: Log in to INFORMS > Employee Self-Service > Travel and Expenses > Create a Travel Authorization
2.	<p>Select Add New Value and enter the Employee ID. Finally, select Add:</p> 
3.	<p>Complete the Travel Authorization header (fields with an asterisk are required fields):</p> <ul style="list-style-type: none"> • Select an appropriate Business Purpose from the dropdown menu options • Enter your travel authorization Description • Select Default Location from the dropdown menu options • Select travel dates • If applicable, select the Cash Advance Requested check box and / or Vacation Combined with Travel Check box • Use the Attachments link to attach documents to your request <p>Note: The Reference field introduces additional workflow approvals and should be left blank unless one of the predefined selections apply.</p> 

Step	Action																				
4.	<p>Complete Projected Expenses that apply to your travel - Per Diem Meals</p> <p>When Per Diem-Full Day or Per Diem-First and Last Day are selected, a Meal Exceptions dropdown Menu will appear to give employees the option to specify any meal exceptions they may have.</p> 																				
5.	<p>Enter Projected Expenses that apply to your travel then select Save for Later.</p>																				
6.	<p>Review header detail information, review Projected Expenses including the Accounting Detail lines associated with each expense, Payment Type and Amount. Select Summary and Submit to submit.</p>  <table border="1" data-bbox="446 1438 1128 1512"> <thead> <tr> <th>Amount</th> <th>GL Unit</th> <th>Fund</th> <th>Dept</th> <th>Account</th> <th>Grant</th> <th>PC Bus Unit</th> <th>Project</th> <th>Activity</th> <th>Source Typ</th> </tr> </thead> <tbody> <tr> <td>69.00</td> <td>MDADE</td> <td>01001</td> <td>BU07010000</td> <td>531210000</td> <td>NO-GRANT</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Amount	GL Unit	Fund	Dept	Account	Grant	PC Bus Unit	Project	Activity	Source Typ	69.00	MDADE	01001	BU07010000	531210000	NO-GRANT				
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Step	Action
7.	<p>Record your Authorization ID and ensure that the Cash Advance Requested flag is selected (if applicable).</p>  <p>Check the reasonable estimation certification box. Then select Submit Travel Authorization.</p> 
8.	<p>A pop-up box will appear to request confirmation of your travel authorization. Review the Total Authorized Amount and select OK.</p> 

Step	Action								
9.	<p>The Travel Authorization Document has been submitted for approval. Verify submission.</p> <p>Select Refresh Approval Status to view approval history.</p> <div data-bbox="370 506 1406 898"> <p>Travel Authorization</p> <p>Danny Vargas</p> <p>Your travel authorization 0000005258 has been submitted for approval.</p> <p>Business Purpose: Education</p> <p>Description: Business Writing Workshop</p> <p>*Default Location: Orlando, FL</p> <p>Date From: 04/10/2024</p> <p>Date To: 04/11/2024</p> <p>Authorization ID: 0000005258</p> <p>Submission in Process</p> <p>Totals</p> <p>Projected Expenses (1 Line): 69.00 USD</p> <p>Denied Expenses: 0.00 USD</p> <p>Total Authorized Amount: 69.00 USD</p> <p><input type="checkbox"/> By checking this box, I certify these costs are reasonable estimates and comply with expense policy.</p> <p>Submit Travel Authorization</p> <p>Refresh Approval Status</p> <p>Return to Search Notify</p> </div> <div data-bbox="370 940 1406 1171"> <p>Approval History</p> <p>Submitted: Danny Vargas</p> <p>Travel Liaison (Pooled)</p> <p>HR Supervisor: Inette Ransolo-Hernandez</p> <p>Department Director: David Costello</p> <p>Chief: Calaisene Edwards</p> <p>Central Finance EX Processor (Pooled)</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Role</th> <th>Name</th> <th>Date/Time</th> </tr> </thead> <tbody> <tr> <td>Submitted</td> <td>Employee</td> <td>Danny Vargas</td> <td>04/09/2024 3:02:18PM</td> </tr> </tbody> </table> <p>Return to Search Notify</p> </div>	Action	Role	Name	Date/Time	Submitted	Employee	Danny Vargas	04/09/2024 3:02:18PM
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