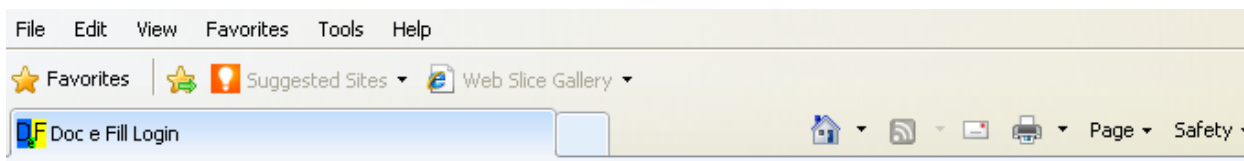


Professional Development Online Travel Authorization Instructions

Prior to making travel arrangements, approved Professional Development recipients must request the PD travel form from the Organization Coordinator, Teresa Smith. The Professional Development Organizational Coordinator must release the Professional Development travel form to participants.

Upon receipt of PD online travel authorization form, traveler will follow the guidelines established for online travel.

Please Note: If you are logging in for the first time, follow the instructions listed below under *YTC eForms*.



Welcome, Please Login

Username:

Password:

[Forgotten your username/password?](#)

YTC eForms

- Log in to your account using your WebAdvisor User ID
 - First initial, last name, last four digits of Student ID
 - John Doe's Student ID is 0123456 - his User ID is jdoe3456
 - Password will match WebAdvisor User ID with the last four digits of the student ID **duplicated**.
 - John Doe's User ID is jdoe3456 - his password is jdoe34563456

Once PD Coordinator has sent you the Professional Development *Travel Authorization Form*, you may access the form from your received folder.

A screenshot of a web browser displaying the Doc e Fill application. The browser address bar shows the URL: https://eforms.yorktech.edu/docefill/main.aspx. The page header includes the York Technical College logo and the tagline "One College. Many Opportunities." The main content area is titled "PART 1 - Travel Authorization (Estimate to be completed and approved prior to travel)". The form contains the following fields:

- Person to Travel: Teresa Smith
- Traveler's CID: 0219
- Date: 2/27/2013
- Account Number: 1234567891011
- Project Number: 0000001
- Project Date Begin: 02/28/2013
- End: 03/02/2013
- Est. Exp: \$500.00
- Project Title: Online Travel Training
- Project Expense Detail:
 - \$250 - hotel
 - \$100 - meals
 - \$150 - registration

The left sidebar shows a "Document Library" with a tree view containing "Professional Development" and "Travel Authorization", each with a sub-item "Professional Development Form" and "Travel Authorization Form" respectively. At the bottom of the page, there is a "Destination" dropdown menu, buttons for "Send", "Attachment", "Save Draft", and "Cancel", and a "Comments:" text area.

Travelers Name:
 CID:
 Date:

I certify that I have read the Travel Guidelines ([Travel Guidelines](#)) and have signed up for E-Check reimbursement ([Sign-up Instructions](#))

Start Point City: State: Date: Time:

Destination City: State: Date: Time:

Return City: State: Date: Time:

Budget Account number to charge travel expenses

Account 1:

Purpose of Travel and/or Comments:

Registration Fee: Estimate of Total Expenses:

Will you need a College credit card? Yes

Will there be a need for a College provided vehicle? Yes

List the names of those traveling with you and any alternate drivers:

Driver 1:

Name, CID#, and Date will auto-populate, based on your log-in. You must certify that you have read the *Travel Guidelines* by checking the box. The link to the *Travel Guidelines* is highlighted in blue.

Start Point: Location where travel begins (i.e., YTC, home, or other).

Destination: Location you are traveling to (i.e., conference, meeting, or other location). List specific details under *Purpose of Travel and/or Comments* section (i.e., Peer Group Meeting – Columbia, SC; SCTEA – Myrtle Beach, SC; etc.).

Return: Location where travel ends (i.e., YTC, home, or other).

Budget Account Number: Your fifteen (15) digit account number (i.e., 101234567550000) where your travel should be charged. If travel charges are to be split between accounts, click the plus sign (+) to add another account number.

Purpose of Travel/Comments: Provide details of travel (i.e., sponsor, reason for meeting/conference/workshop, etc., or any additional information to clarify the reason for travel (i.e., monthly travel).

Registration Fee: Include amount for registration fee regardless of how payment was made (i.e., YTC check request or self -paid).

Estimate of Total Expenses: Include all expenses related to travel (i.e., airline tickets, hotel, baggage fees, meals, registration fee, rental car, mileage, parking, etc.).

College Credit Card: May be used as outlined in *College Travel Guidelines*. Upon approval of travel, an email will be sent to Accounts Payable office requesting a College credit card. If you have questions or need additional information, please contact the Accounts Payable office @ (803) 325-2875 or ext. 2875.

College Vehicle: Upon approval of travel, an email will be sent to the Facilities Management Department requesting a College provided vehicle. If you have questions or need additional information, please contact Facilities Management @ (803) 981-7223 or ext. 7223. The Administrative Coordinator

Route the completed form to your supervisor by selecting his/her name from the drop-down menu.

PART 1 - Travel Authorization
(Estimate to be completed and approved prior to travel)

Travelers Name: Kelly Estes CID: 000194229 Date: 11/7/2011

I certify that I have read the Travel Guidelines ([Travel Guidelines](#))

Start Point City: _____ State: _____ Date: _____ Time: _____

Destination City: _____ State: _____ Date: _____ Time: _____

Return City: _____ State: _____ Date: _____ Time: _____

Budget _____ Expenses _____

Account _____

Purpose _____

Registration _____

Will you _____

Will the _____

List the _____

Driver _____

Estimate of Total Expenses: _____

Yes

Vehicle? Yes

and any alternate drivers: _____

History

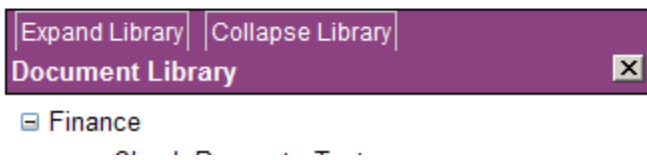
Send Attachment Save Draft Cancel

Comments: _____

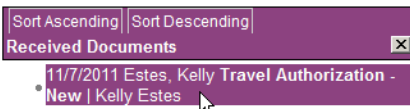
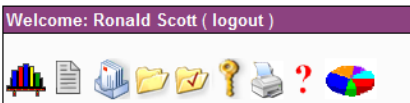
From the drop-down menu, select appropriate supervisor for approval and press send. Supervisor will receive an email as notification.

Comments may be provided in the *Comments* section. Agendas for conferences, workshops, or meetings must be attached (For instructions on how to attach documents, see pages 9 - 10).

Supervisor logs in and clicks *Received Documents* (envelope).



Supervisor selects document to review. All documents waiting for this supervisor's approval will be included in this list.



As part of the approval process, supervisors will need to check to see if a credit card or vehicle has been requested and press send in each section to submit the request.

Registration Fee: Estimate of Total Expenses:

Will you need a College credit card? Yes

To: *apclerkeforms@yorktech.edu*
Subject: *College Credit Card Request*

FYI - Kelly Estes approved for Credit Card checkout on 11/8/2011.

Will there be a need for a College provided vehicle? Yes

To: *fmeforms@yorktech.edu*
Subject: *College Vehicle Request*

Please make vehicle arrangements for Kelly Estes to travel from Rock Hill, SC, on 11/09/2011 around 09:00 AM to Columbia, SC, estimated arrival 11:00 AM and back to Rock Hill, SC, on 11/15/2011 around 06:00 PM. The vehicle will be charged to 123456789123456.

Alternate drivers may be .

List the names of those traveling with you and any alternate drivers:

Driver 1: +

Supervisor's Signature:

Do NOT send if not approved.

History

Start: Kelly Estes --> Ronald Scott 11/07/11 10:53 AM Sent [View](#)

To Deny:

Select **History** from the drop-down menu to select employee's name and press **Deny**.

Welcome: Ronald Scott (logout)

Sort Ascending | Sort Descending
Received Documents

11/7/2011 Estes, Kelly Travel Authorization
New | Kelly Estes

Registration Fee: Estimate of Total Expenses:

Will you need a College credit card? Yes

To: apclerkeforms@yorktech.edu
Subject: College Credit Card Request

FYI - Kelly Estes approved for Credit Card checkout on 11/8/2011.
Your message has been sent.

Destination: or a College provided vehicle? Yes

Abdallah, Nur Jahan
Abercrombie, James
Adams, Barry
Adams, Hazel
Adams, Tamarla
Adcock, Natalya
Adickes, Jeanie
Agbor, Andu
Agers, Knechelle
Aldridge, Kenneth
Alexander, Kisa
Allen, Jack
Allen, Shenee
Allen, Tiffany
Allen-Thompson, James
Anders, Michael
Anderson, James
Anderson, Joshua
Ardis, Christopher
Arthur, Elizabeth
Atkinson-Feaster, Yolanda
Ayers, Robert
Baba, Ramses
Bagley, Amanda
Bagwell, Jack
Baier, Christa
Bailey, Debra

Vehicle Request

arrangements for Kelly Estes to travel from Rock Hill,
around 09:00 AM to Columbia, SC, estimated arrival 11:00 AM
and back to Rock Hill, SC, on 11/15/2011 around 06:00 PM. The vehicle will be charged to 123456789123456.
Alternate drivers may be .
Your message has been sent.

List the names of those traveling with you and any alternate drivers:
Driver 1:

Supervisor's Signature: Ron Scott

--> Ronald Scott 11/07/11 10:53 AM Sent [View](#)

Destination: Send/Authorize Deny Update Attachments PrintPreview Cancel

Comments:

To Approve:

VERY IMPORTANT: Type your name in the **Supervisor's Signature** field. Select **History** from the drop-down menu to select employee's name and press **Send/Authorize**.

Subject: College Vehicle Request

Please make vehicle arrangements for Kelly Estes to travel from Rock Hill,
SC, on 11/09/2011 around 09:00 AM to Columbia, SC, estimated arrival 11:00 AM
and back to Rock Hill, SC, on 11/15/2011 around 06:00 PM. The vehicle will be charged to 123456789123456.
Alternate drivers may be .
Your message has been sent.

List the names of those traveling with you and any alternate drivers:
Driver 1:

Supervisor's Signature: Ron Scott

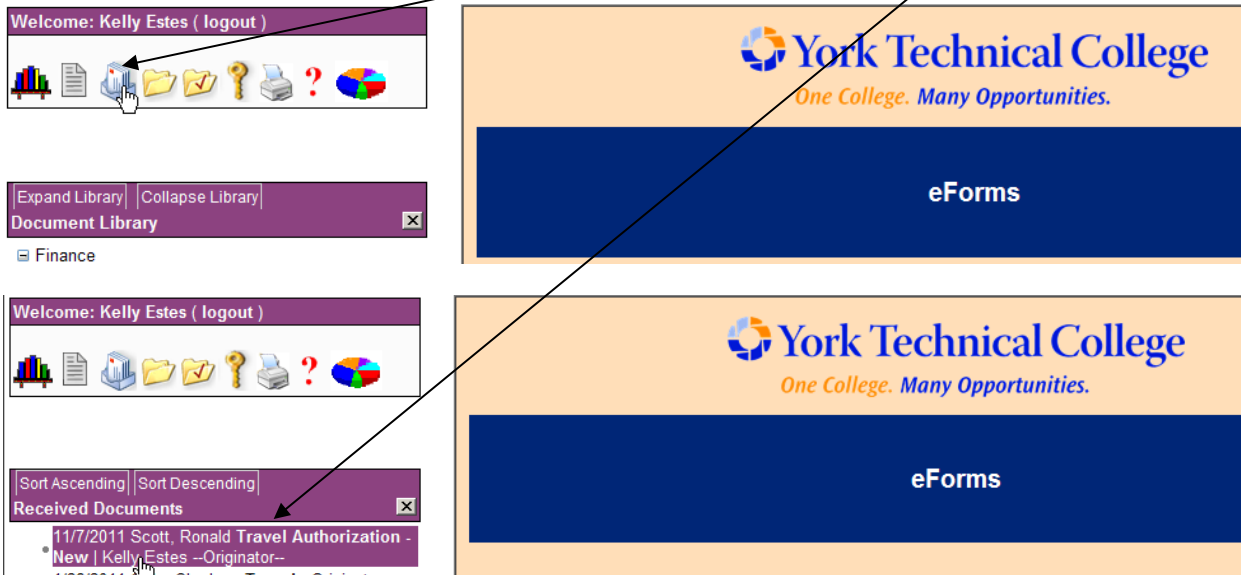
History

Start: Kelly Estes --> Ronald Scott 11/07/11 10:53 AM Sent [View](#)

History Destination History Estes, Kelly

Send/Authorize Deny Update Attachments PrintPreview Cancel

Employee logs in, clicks *Received Documents* (envelope) and selects form to check for approval.



Reimbursement

To prepare your travel authorization for reimbursement, complete relevant sections in Part 2. If additional days/weeks are needed, press + sign below.

PART 2 - Expense Details
(to be filled out upon your return)

Expense Dates:	06/19/2012	06/26/2012						Totals
*Personal Vehicle Miles:	23.92	42.72						
*Personal Vehicle Rate:	12.08	21.57						33.65
Airline, Train, Bus:								
Rental Car:								
Taxi, Shuttle:								
Hotel:								
Breakfast:								
Lunch:								
Dinner:								
Parking/Toll Fee:								
Other:								
								Week Total:

Additional weeks of travel

Notes of Explanation to include changes in schedule or other reasons for differences in amounts from initial

Subtotals of travel expenses:

If you have special circumstances or need to include additional information, use the *Notes of Explanation*. For additional information, access the *Travel Guidelines* link in Part 1.

Notes of Explanation to include changes in schedule or other reasons for differences in amounts from initial estimate:

Lunch was provided during the week, see attached agenda.

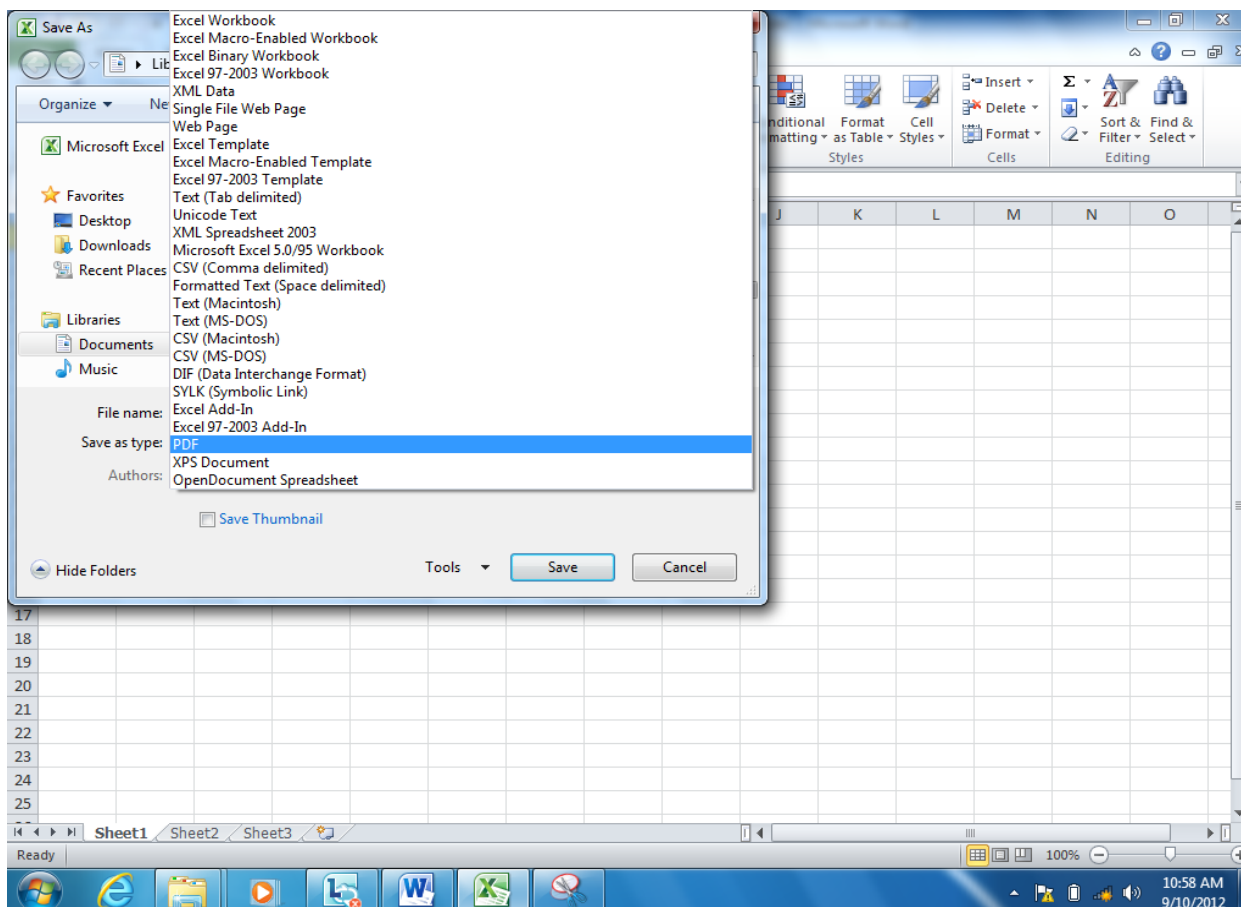
Subtotals of travel expenses: 938.00

prepaid/non-covered expenses: 240

Amount to be reimbursed to traveler: \$698.00

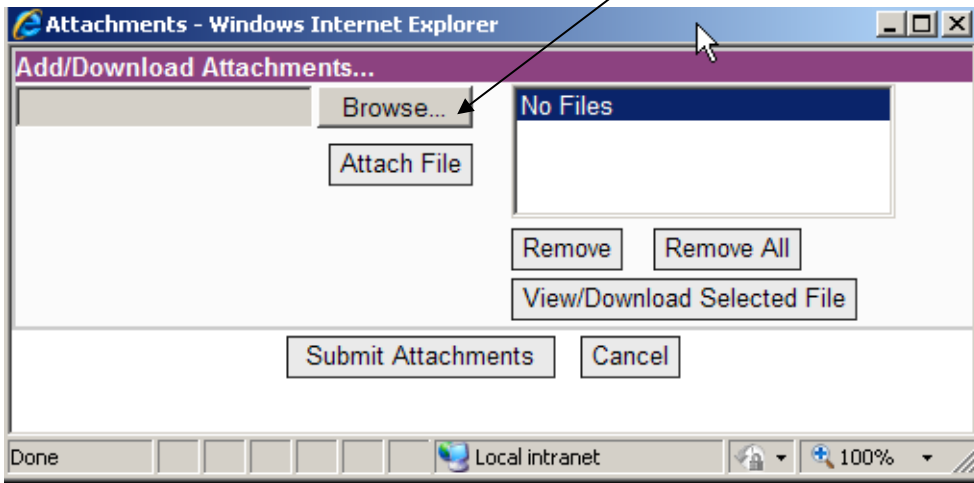
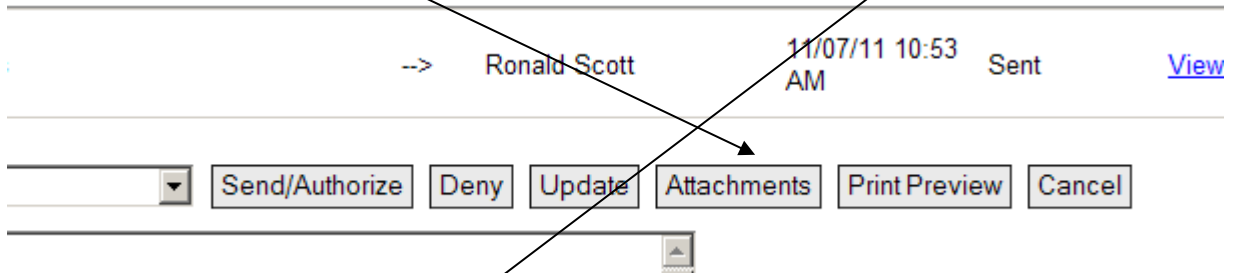
Supporting Documentation (receipts, agendas, etc.):

All supporting documentation must be scanned as a PDF document, saved to your computer, and attached to your electronic travel form. Items scanned on the new copiers are automatically scanned as PDF documents. To save a document in PDF format, open document, click file – *save as*. In the *save as* type box, select PDF and save to your computer. Name your file and select a location to save the document. Remember this location so that you can attach to your electronic travel form.



Attaching Documents

To attach documentation, press **Attachments** and select appropriate file, using the **Browse** button. You may include up to ten attachments.



Click on **History** to display the routing history for this form.

Destination								
History	40	40						80.00
Abdallah, Nur Jahan	99	99						198.00
Abercrombie, James	6	6						12.00
Adams, Barry								
Adams, Hazel								
Adams, Tamarla								
Adcock, Natalya	12							12.00
Adickes, Jeanie								
Agbor, Andu								
Agers, Knechelle								
Aldridge, Kenneth								
Alexander, Kisa								
Allen, Jack								
Allen, Shenee								
Allen, Tiffany								
Allen-Thompson, James								
Anders, Michael								
Anderson, James								
Anderson, Joshua								
Ardis, Christopher								
Arthur, Elizabeth								
Atkinson-Feaster, Yolanda								
Ayers, Robert								
Baba, Ramses								
Bagley, Amanda								
Bagwell, Jack								
Baier, Christa								
Bailey, Debra								

of travel

Explanation to include changes in schedule or for differences in amounts from initial

Subtotals of travel expenses: 938.00

provided during the week, see attached

prepaid/non-covered expenses: 24.00

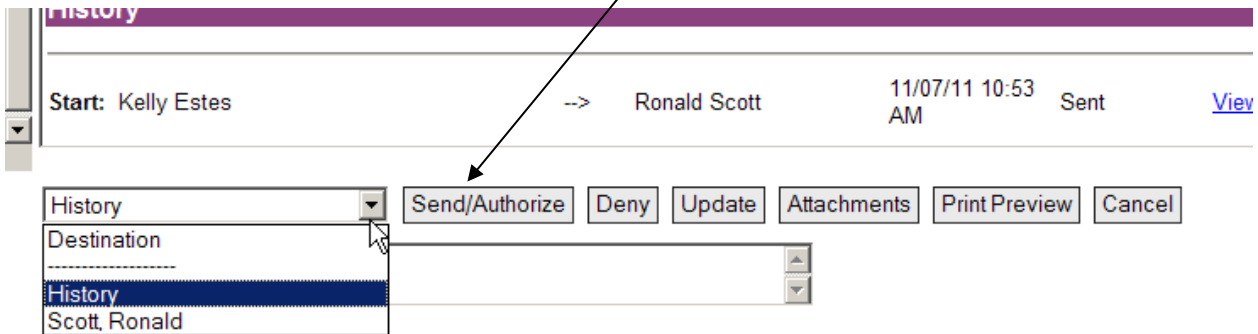
Amount to be reimbursed to traveler: 968.00

Destination: Ronald Scott 11/07/11 10:53 AM Sent View

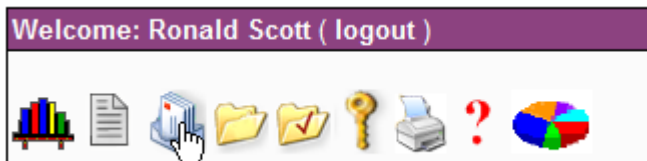
Send/Authorize Deny Update Attachments Print Preview Cancel

Comments:

Select your supervisor from the list, press *Send/Authorize*.



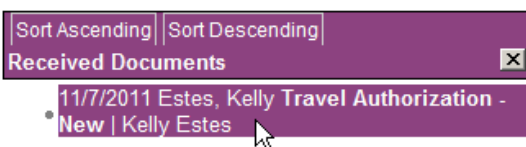
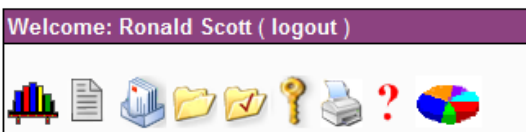
Supervisor logs in and clicks on *Received Documents* (envelope).



Supervisor clicks form and reviews to ensure that actual expenses do not exceed estimated expenses and that supporting documentation (i.e., agendas, receipts, travel logs, airline itineraries, etc.) is attached.

Please note: A Professional Development Evaluation form MUST be attached to the travel reimbursement form.

Upon approval, supervisor MUST print evaluation form, sign, and route to PD Organizational Coordinator, Teresa Smith.

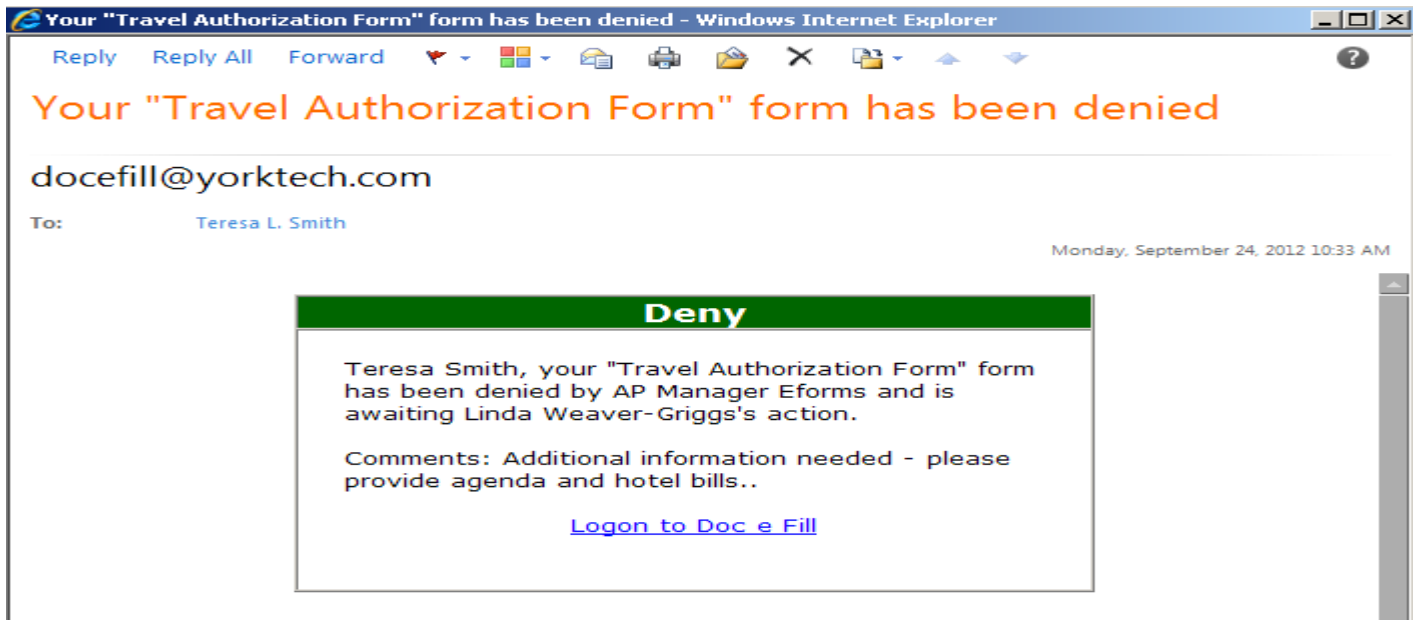


If adjustments/revisions are not needed, supervisor sends approved form by selecting **Eforms AP Clerk**, and **Send/Authorize**.

If adjustments/revisions are required or supporting documentation is missing, the supervisor should provide detailed information in the **Comments** section. The form should be denied and routed back to the employee to correct.

The screenshot displays a software interface for document routing. On the left, a vertical list of names is shown, with 'Eforms, AP Clerk' highlighted in blue. On the right, a form contains several fields and buttons. A table at the top right shows a value of 12.00. Below it, a 'Subtotals of travel expenses' field is set to 938.0. Other fields include 'prepaid/non-covered expenses' at 24 and 'Amount to be reimbursed to traveler' at \$698.0. A routing path is shown as '--> Ronald Scott 11/07/11 10:53 AM Sent' with a 'View' link. At the bottom, a row of buttons includes 'Send/Authorize', 'Deny', 'Update', 'Attachments', 'Print Preview', and 'Cancel'. A 'Comments:' field is located at the very bottom.

Documents submitted to the AP Clerk/AP Manager without appropriate documentation will be denied and re-routed back to the employee's supervisor for follow-up. Everyone in the routing process will be notified by email. The *Comments* section will include reason for denial and/or actions needed to correct.



Supervisor denies and re-routes form back to employee for correction needed.

Employee makes corrections and re-routes to supervisor.

Supervisor verifies that corrections have been made, documents approval in the *Comments* section and re-routes to either AP Clerk or AP Manager, depending on who returned the form.

Employee will receive an archive email notification once the form has been processed for payment. A separate email will be sent when the eCheck process is complete.

