Travel Request (Out-of-State/Foreign) Basic Requirements
(For UH-Hilo use only)

Department Responsibilities

Start by going to the eTravel Home Page which can be found at http://www.hawaii.edu/etravel/. The formal travel procedures are available here.

All Travelers and Preparers must create a profile in Profiler at http://www.hawaii.edu/profiler/.

- From the Main Menu, select My Position Profile then click on the My Application Info tab and select the Default Fiscal Group – UH Hilo (00056). Also, select the My Preparers tab in the same section and input the travel preparer(s) that will be processing the traveler's documents.

- Signing up for direct deposit via ePayment at www.hawaii.edu/epayment/ is strongly recommended for quicker reimbursements and to prevent having the hard copy checks being in the mail.

Creating an Out-of-State/Foreign Travel Request:

- Log into eTravel from the Main menu at http://www.hawaii.edu/etravel/.
- Under the Create column in the top left, click on New Travel Request – Taking a trip.

Create New Travel Request Step 1:

- Select the Traveler's name
- Travel Dates: Input From and To dates
- Destination: Select Out-of-State U.S., Out-of-State, Foreign, or Mixed (Select Mixed only for Foreign travel with multiple business destinations.)
- Itinerary Type: Select if One Leg or Multi Leg (Select Multi Leg only if there are business destinations in more than one city). Connecting flights are not considered Multi Leg.)
- Business Office: It should default to 00056 – UH Hilo. The Profiler Default Fiscal Group should have been set to UH Hilo. However, if a different campus is funding the trip

entirely, select the different campus instead for approval routing purposes.
- Process Travel Via:
  UH Disbursing Office if being paid with UH funds.
  UH Foundation if being paid via UHF.
  None No Cost Travel - only if this trip is for official UH business purposes that is being funded by Non-UH funds.
- No. of Account Codes: One, Two or more account codes.
- Accounting Method:
  By Percentage – If only one account is charged
  Fixed Amount – If more than one account is being charged with a specific amount for each account.
  Manual – If specific accounts needs to be charged a certain amount for multiple expenses.
- Claim Travel Advance: Yes or No.
- Click Next to create the document.

Travel Request:

- The information completed in Step 1 will be filled in the travel request.
- Primary Category: Select the purpose of trip category
- Justification: Notate the name of meeting, conference, workshop, or other business purpose, etc.
  Date(s)of business
  Location(s) of business
- Coverage of Duties: Input as necessary
- Source of Funds: Input account number(s)being charged.

Proposed Business Itinerary:

- *Click on any calculate button after inputting any updates/adjustments so the entire document can be re-calculated.
- Destination:
  Start destination should always be Hilo, HI
  List destination(s) traveling to: City and State
  End destination should always be Hilo, HI
- Date and Time:
  AT ARPT: (At Airport-optional) All Out-of-State trips have a 3 hour allowance prior to departure time. If the depart time is 8 am, the at airport time can be up to 5 am.
  DEP: Input actual depart date/time from Hilo
  ARR: Input actual arrival date(s)/time(s) for each business destination. (Connecting flights are not required to be inputted. However, inputting the connection destinations

will help keep track of where the traveler is at any given time during the trip for safety reasons.)
ARR: End destination should always be Hilo.

- Minus Days: Input number of personal days in the -Pers Days block. Leave blank if the entire trip is for official business.

- F.A.R.: (Federal Allowable Rate) Click on the "F.A.R." and the Per Diem rates will show. The left side will show the Contiguous U.S. rates by state. The right side will show the Foreign rates by country. Take off the check mark in the Include Military Installations box then click on CALCULATE to show the rates. It will show the Maximum Lodging rates. Also, the Local Meals and Local Incidental rates (M&IE – Meals and Incidental Expenses). Add the Local Meals and Local Incidental columns to obtain the full M&IE rate.

- F.A.R. column:
  Lodg: Input the FAR from above
  M&IE: Input the FAR from above

- Est'd Rate column:
  Lodg: Input the estimated lodging costs from the room reservation/confirmation. If this amount is higher than the FAR, two lodging quotes will need to be attached. A justification will also be required by clicking on the bed icon in the cost column. If staying at the conference hotel, input conference hotel as the justification and no quotes will need to be attached.

- M&IE: See F.A.R.

- Estimated Expenditures:

  P/D: Itinerary total: Will automatically calculate from the Proposed Business Itinerary section (Lodging plus M&IE). Leave Payment Method and Detail sections blank if being reimbursed.
  TRANS: Airfare: Select the Payment Method from drop down menu, description in the Detail, and amount.
  TRANS: Car Rental: Select the Payment Method from drop down menu, description in the Detail, and amount.

OTHER: Conf/Regis Fee: Select the Payment Method from drop down menu, description in the Detail, and amount.
Additional expenses can be added by selecting from the drop down menu on the bottom of this section and click on the Add Expenditure button.
Advance column:
Fill in the advance amounts that are being requested accordingly with the Est' Exp Amount column. The advance amounts should be equal too or less than this column.

Attachments section:

- Select expense type from the Category drop down menu, input description
  Attach pdf or viewable files of:
  Airline itinerary/confirmation with traveler's name, itinerary and amount.
  Hotel confirmation that matches the Estimated Lodging cost.
  Car Rental reservation/confirmation.
  Official conference information that shows the location, date(s), completed registration form and conference description.

Account Information section:

Campus: UH-Hilo or funding campus

Account: Input

Sub Account: Input if applicable

% Split: 100 if only one account (Fixed and Manual methods will request specific amounts).

Comments section:

- Optional for miscellaneous notes

Once finalized, click on the Submit button and the travel request will be routed to the traveler, appropriate supervisor(s), and executive for electronic approvals.