

Requesting a Travel Advance: Web Travel *Authorization* (advance monies to UNC faculty, staff, or students).

Applicable Ranks: Faculty, Students, Staff*

University policy states:

“Travel advances may be made when necessary to enable faculty or staff to travel to foreign countries only. “

Travel policies website: <http://financepolicy.unc.edu/Document/results?ssCatId=30>

Step	Action	Responsible Person	Time Period
1	<p>Gather required information:</p> <ul style="list-style-type: none"> ○ Completed Travel Form ○ Prior approval for all travel on non-grant funds and <u>all</u> foreign travel (submit form to Matt Rivenbark: jmriven@unc.edu). ○ Traveler PID (ensure that traveler is in the university’s vendor system by searching in Web Vendor – see note below. If not, add traveler to Web Vendor system.) ○ Departure/Destination locations, dates & times ○ Travel Purpose ○ Documents that establish travel costs such as transportation, hotel reservation, etc. ○ <u>Amount being requested in advance</u> 	Executive Assistant/Divisional Admin Support	As soon as decision to travel has been made, at least 30 days prior to travel departure
2	<p>Create Web Travel document for routing Sign in to Finance Central <i>Inbox</i>, choose <i>Web Travel</i>, and enter the traveler’s PID. Enter the requested information in the travel form and choose <i>Authorization</i> for the Travel Type.</p>	Executive Assistant/Divisional Admin Support	2 business days
3	<p>Enter estimated cost details: Enter the estimated amount for meals, accommodation, registration and other expenses.</p>	Executive Assistant/Divisional Admin Support	
4	<p>Complete the Web Travel form and obtain signature Print both bar code and a print version of the travel request for traveler’s signature. Submit all documents to accounting technician when signed</p>	Executive Assistant/Divisional Admin Support	
5	<p>Submit Web Travel document Review Web Travel document; ensure that proper funding is available in FRS and that the correct account is being used. Approve document and route to Travel Services to be approved, vouchered, and paid.</p>	Accounting Technician	1 business day
6	<p>The travel advance will come to the traveler in the form of a check to the business office approximately two weeks prior to travel.</p>		Two weeks prior to departure

Step	Action	Responsible Person	Time Period
7	Traveler must turn in all receipts and unspent funds to the division administrative staff.	Traveler	10 days after return
8	Web Travel document is completed and final version with receipts and unspent funds turned in to the Accounting Technician.	Executive Assistant/Divisional Admin Support	1 day
9	The Web Travel document is processed and routed.	Accounting Tech	1 day

In Step #1: If the traveler's PID is entered and an error is received that says "Valid PID but not Valid Vendor", the Traveler will need to be entered into the Web Vendor system before continuing with remaining steps.

*Divisional administrative support personnel can acquire training to use the Web Travel application at: <http://finance.unc.edu/finance-division/training/training-overview.html>

**If a UNC Employee is a non-resident alien, a copy of his/her visa document may need to accompany the travel authorization.