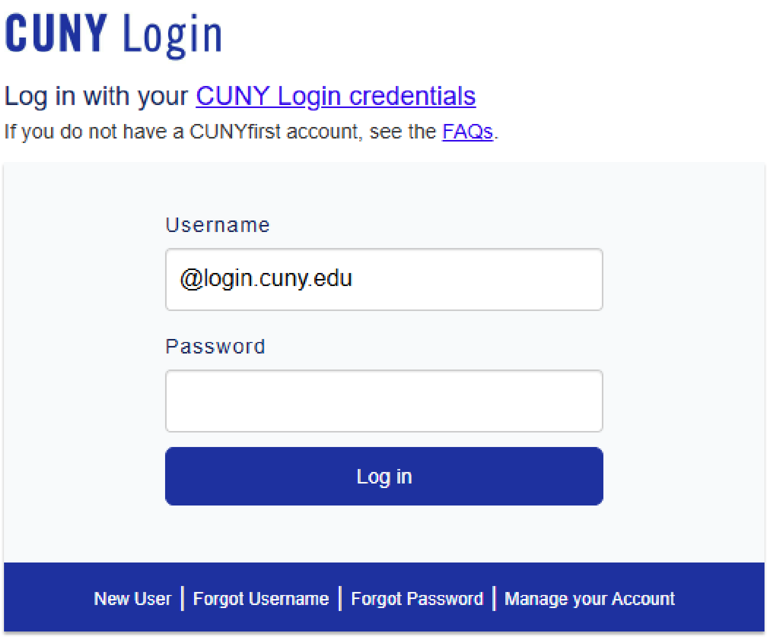
How to Create a Travel Authorization (TA) in CUNYFIRST

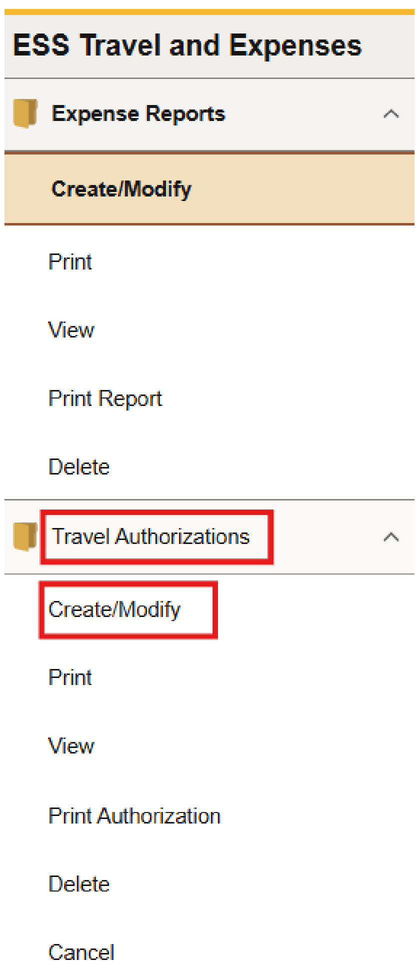
1.) Log onto CUNYFIRST



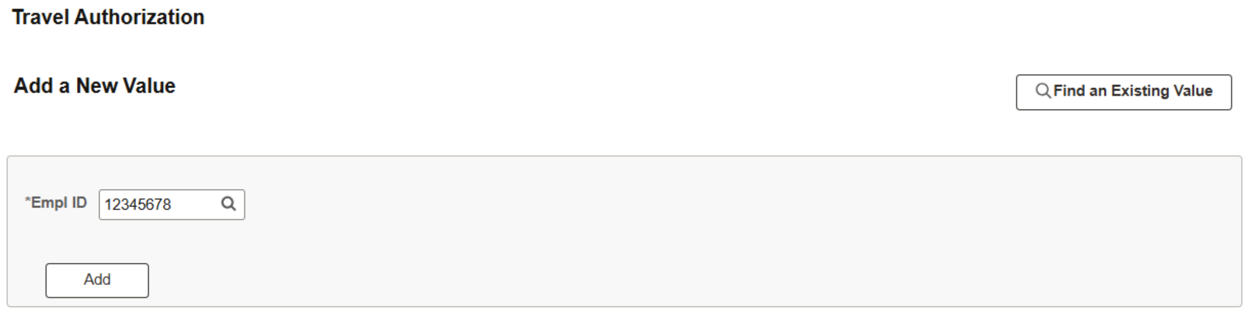
2.) Click on Employee Self Service Tile

3.) Click on ESS Travel & Expense Icon

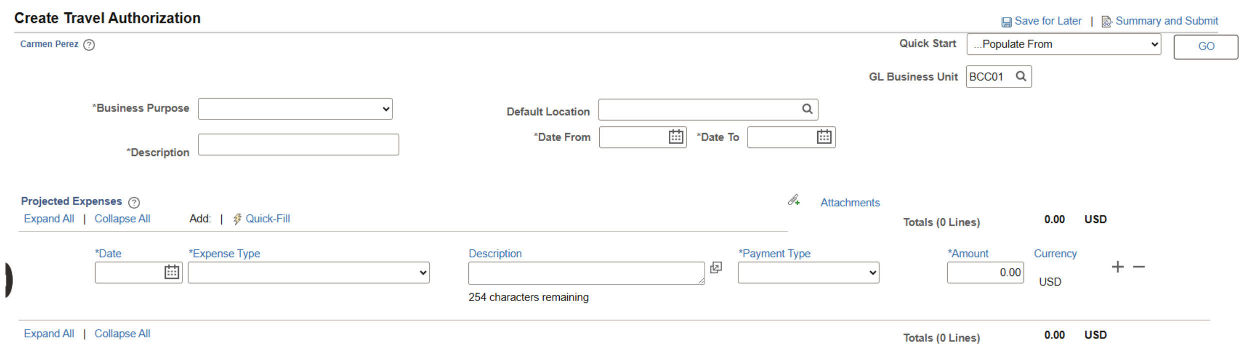
4.) On the left-hand side menu, click on Travel Authorization, then click on create/modify



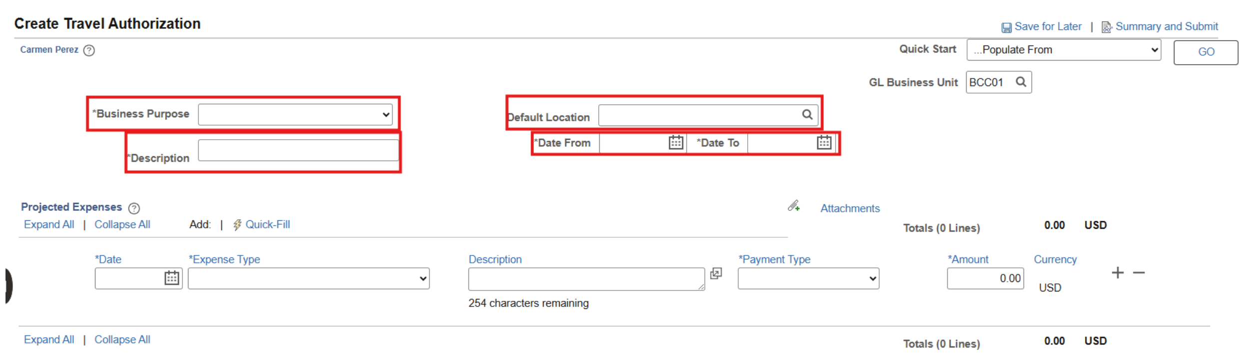
5.) **Enter or Verify your Empl ID and then click the Add button**



6.) **You will now be able to create a Travel Authorization**



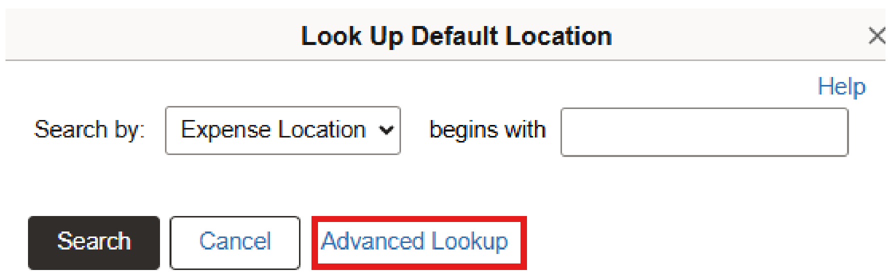
The following highlighted boxes must be filled



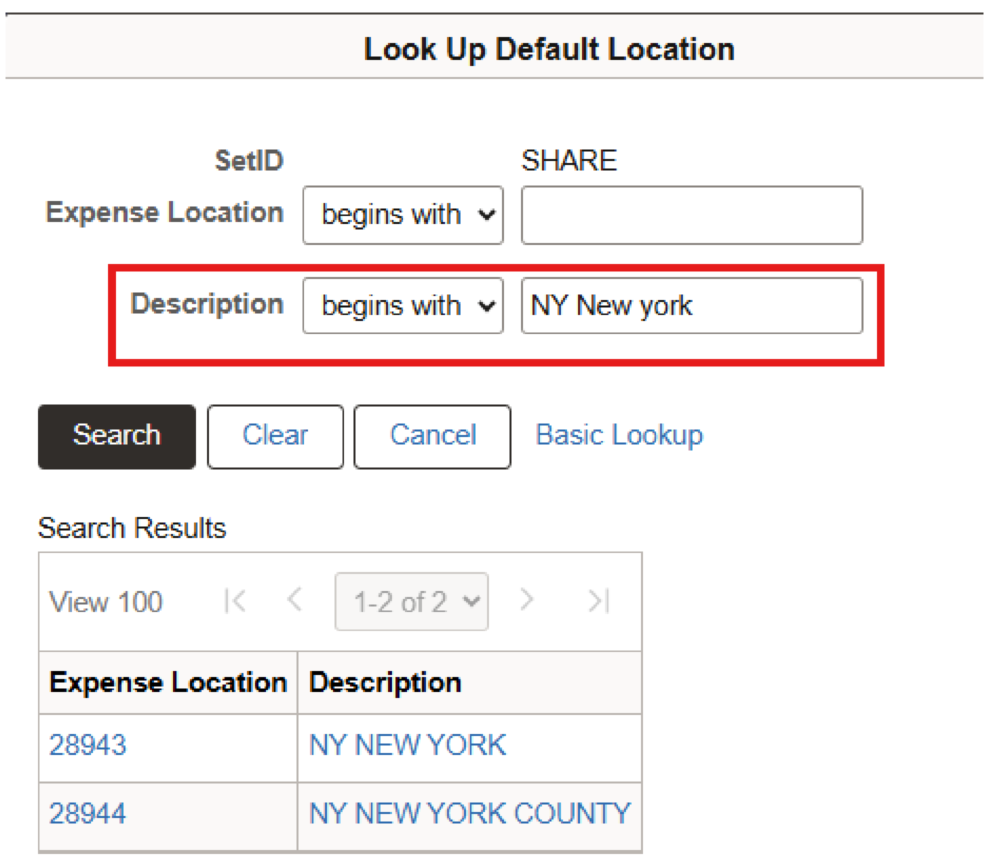
- **Business Purpose – Select from the drop-down menu**
- **Description – Enter a description or name of the trip/conference**
- **Default location – Enter the State and City of where the business trip will take place**

Click on magnifying glass

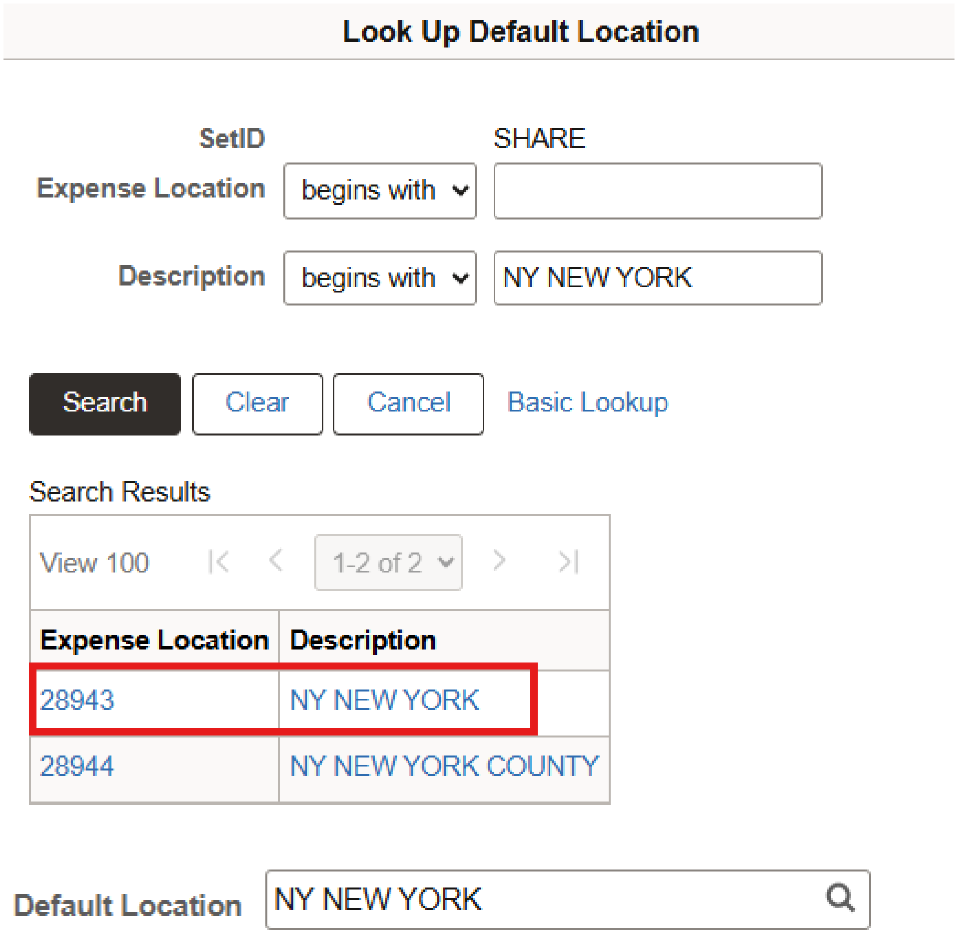
Click on Advanced Lookup



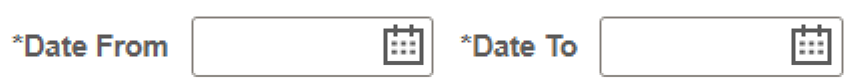
Enter the State and City in the description box (Must be in all CAPS)



Then click on the blue hyperlink of the expense location so it can populate onto the travel authorization



Next select the dates of your trip. **It is important to enter the travel authorization at least 2-3 weeks prior to the trip as the system will not allow past dates to be entered**



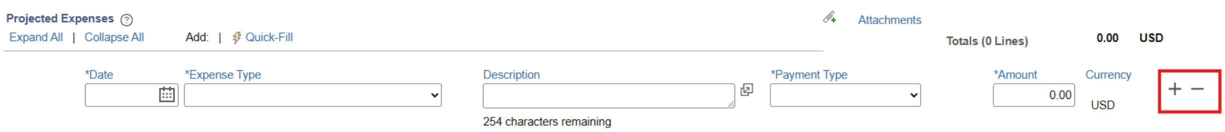
Next click on paper click to add attachments onto the travel authorization

Once the above information has been entered, you may begin to select the projected expense lines of your trip

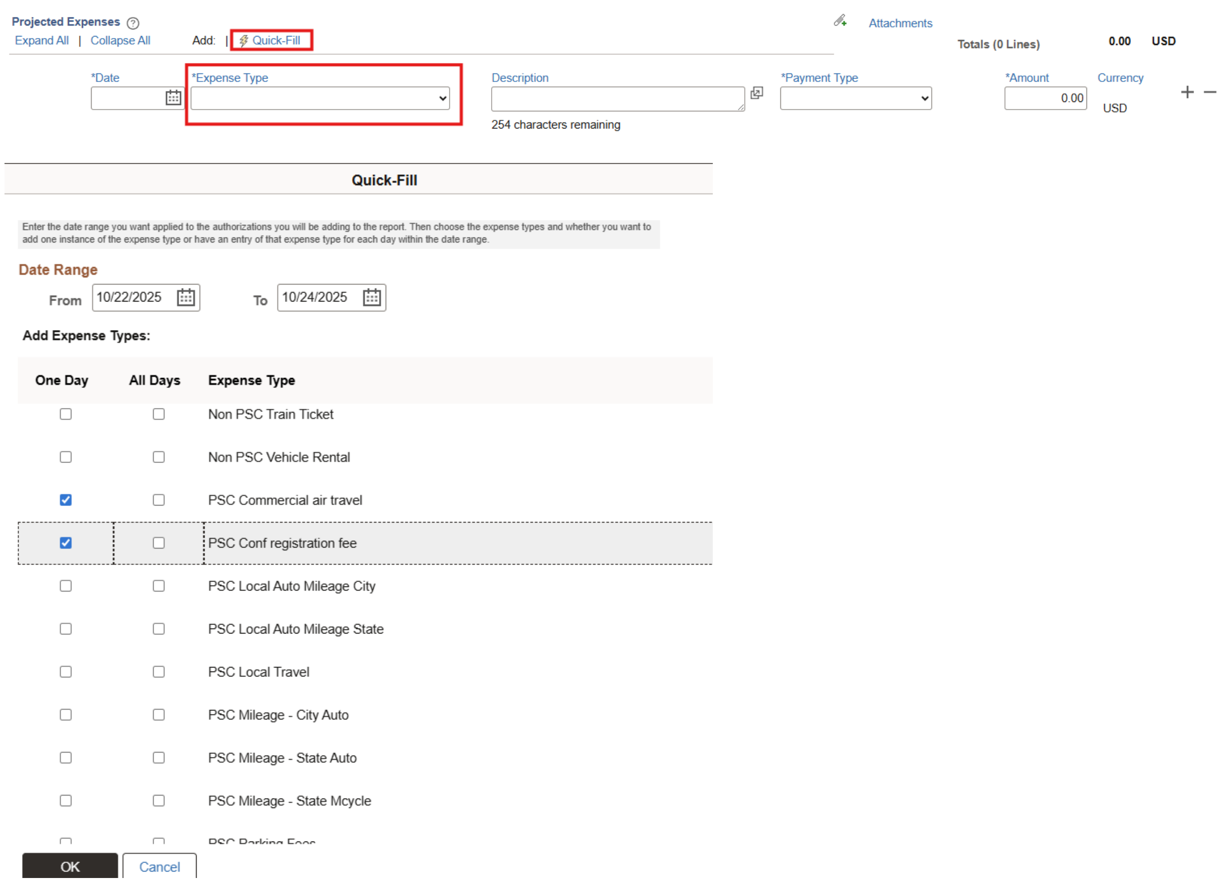
The following must be entered:

- **<u>Date</u>: Enter each date of the conference that correspond with the expense type.**
- **<u>Expense type</u>: You may select PSC related expense lines, otherwise, you can select Non-PSC depending on your title.**
- **<u>Description</u>: enter a brief description of the expense.**
- **<u>Amount</u>: All amounts on the Travel Authorization are estimates unless you know exactly how much you are going to spend.**

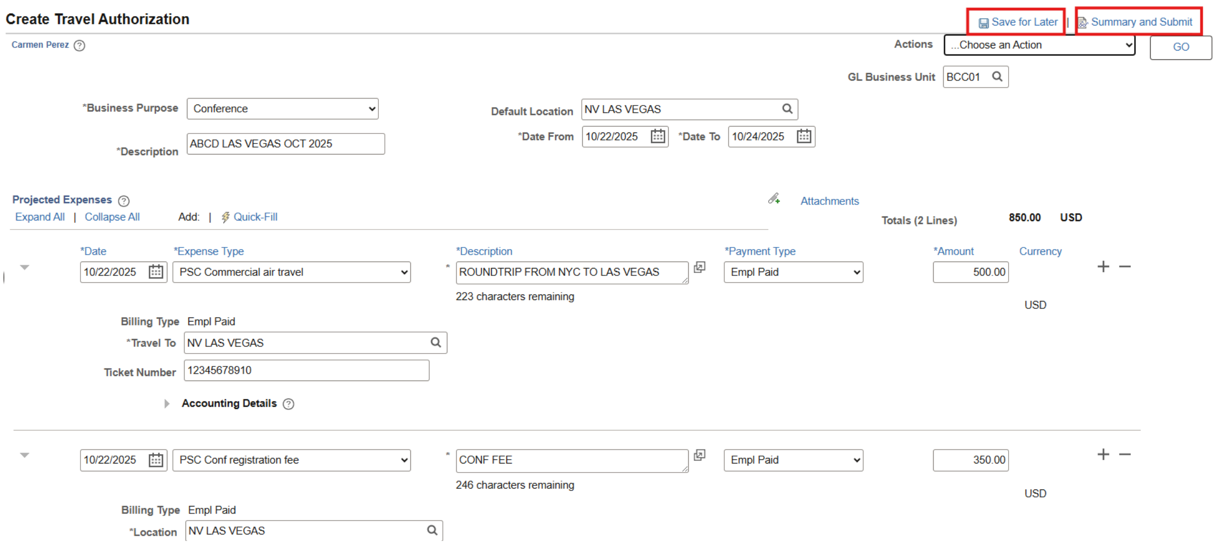
To add or delete an expense line, click on the + or – icon on the right-hand side of the expense line



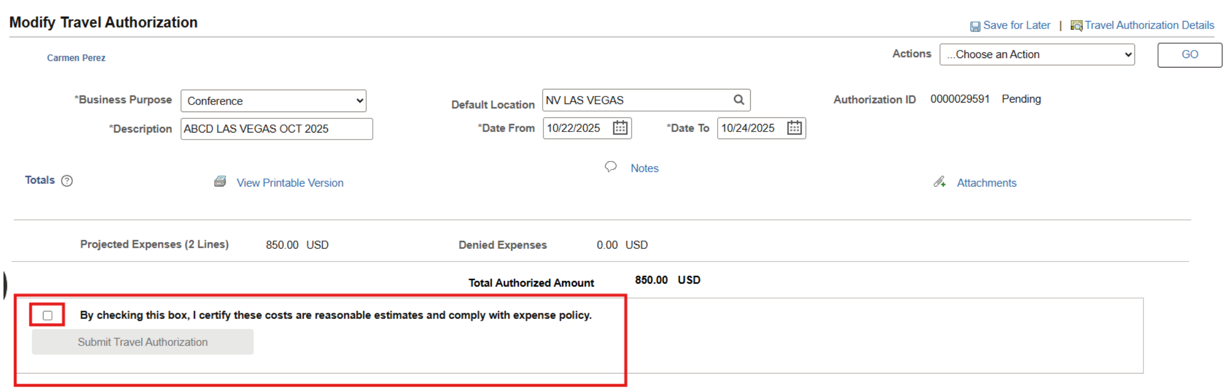
When selecting expense lines, you must select from the drop-down menu or you can select quick fill to select multiple lines at once



Once the details of the expense report have been completed, you may click on Save for Later to save your work, or click on Summary and Submit



Once you click on summary and submit, you must click in the small box on the left-hand side



Then click OK

Your supervisor will receive a notification via a system email that an approval is required. If additional approval is required, the system will generate an email that an approval is needed as well.

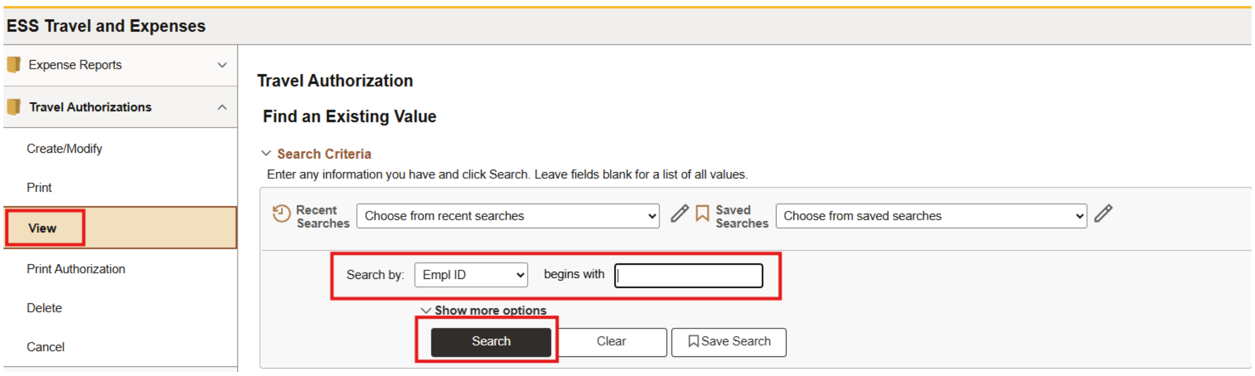
****Notes****

Please visit the Federal Per Diem website prior to booking your trip for current allowable rates:

https://www.gsa.gov/travel/plan-book/per-diem-rates

Once the Travel Authorization is submitted, you or your proxy will not be able to modify the travel authorization. Your supervisor can return your travel authorization if he/she have not yet approved the travel authorization or if the travel authorization has been approved by your supervisor, the Accounts Payable auditor can return the authorization back to you for modification.

You can view where the travel authorization is in the workflow by clicking on View, then enter your Empl Id or Authorization ID in the drop-down menu:



For additional assistance, please contact the Accounts Payable Department at Ext: 5783 or contact Carmen Perez at CarmenPerez01@bcc.cuny.edu