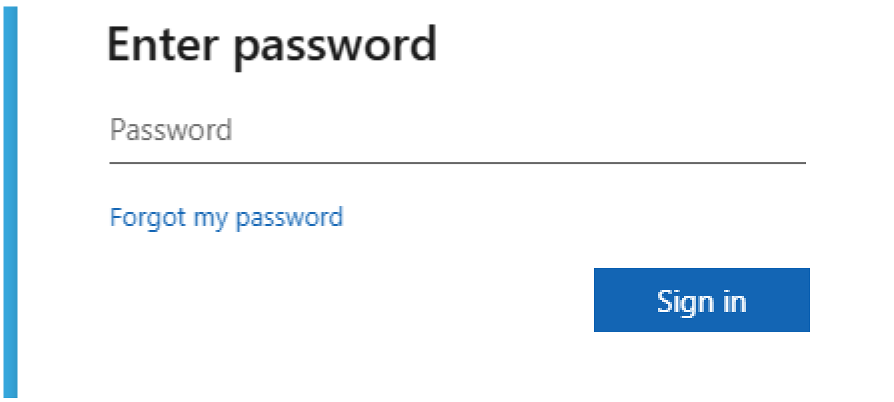
San Diego Community College District

City College · Mesa College · Miramar College · College of Continuing Education

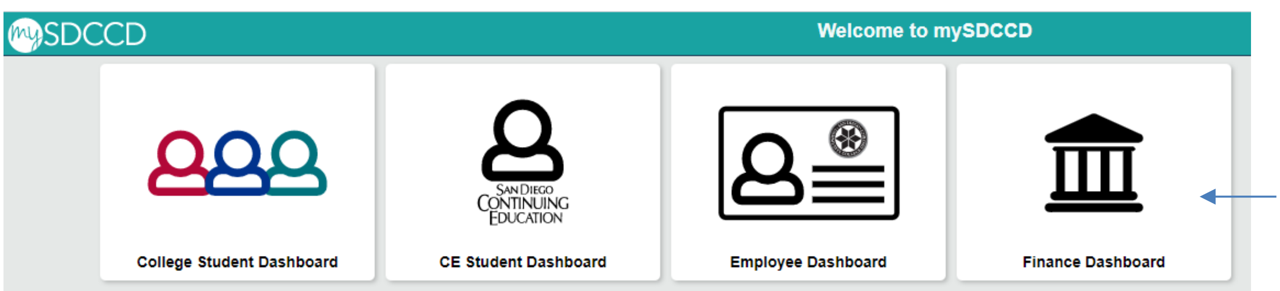
Travel Authorization Procedure

Navigation path to Travel Authorizations:

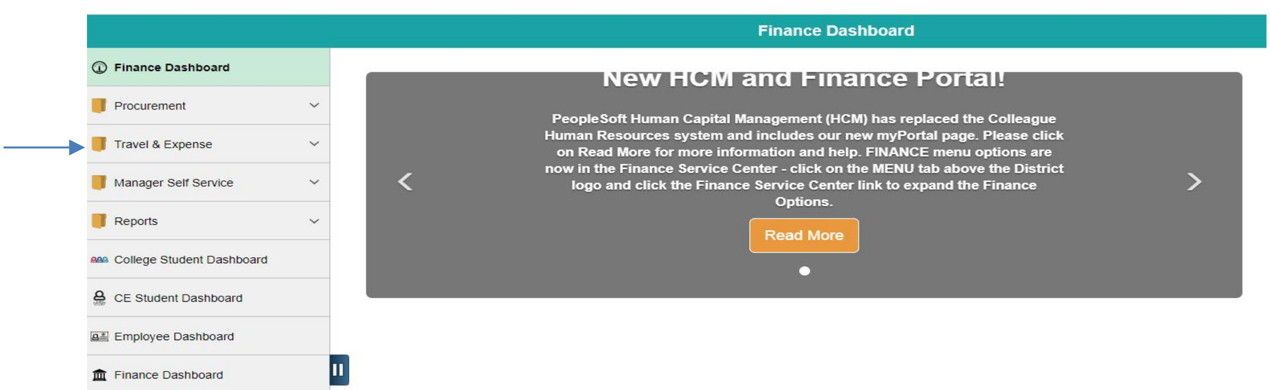
1) Log in to PeopleSoft using: https://myportal.sdccd.edu



2) Click on the Finance Dashboard tile on the main portal

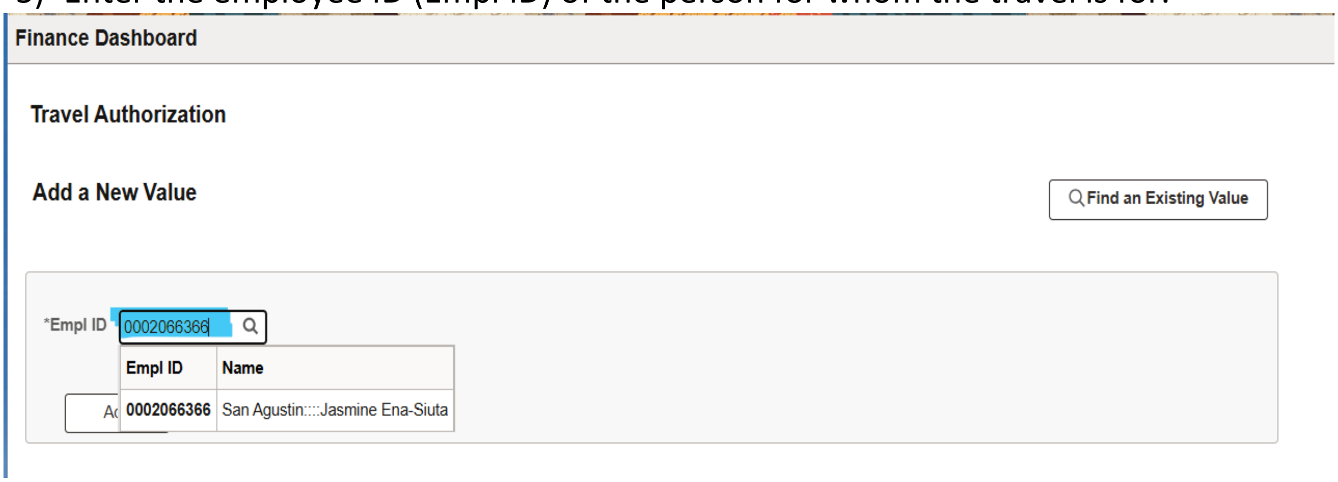


3) Click on Travel & Expense



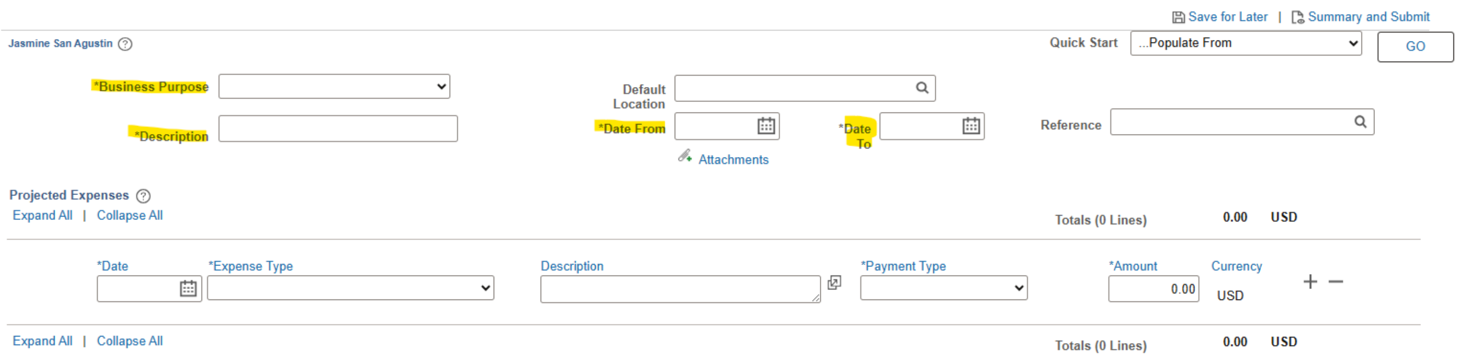
4) Choose Travel Authorization

5) Enter the employee ID (Empl ID) of the person for whom the travel is for.

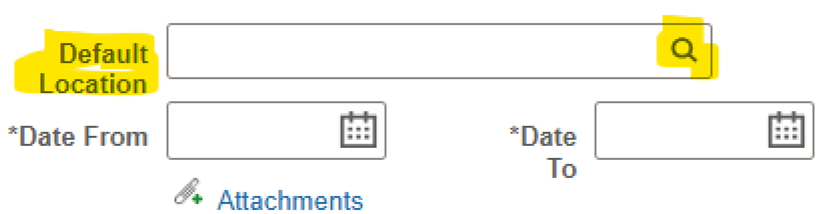


Set up a Travel Authorization:

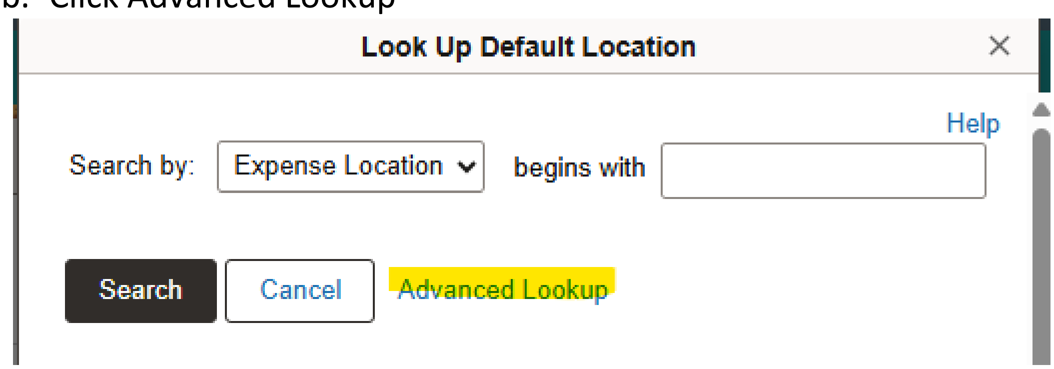
1) Fill in the highlighted fields:



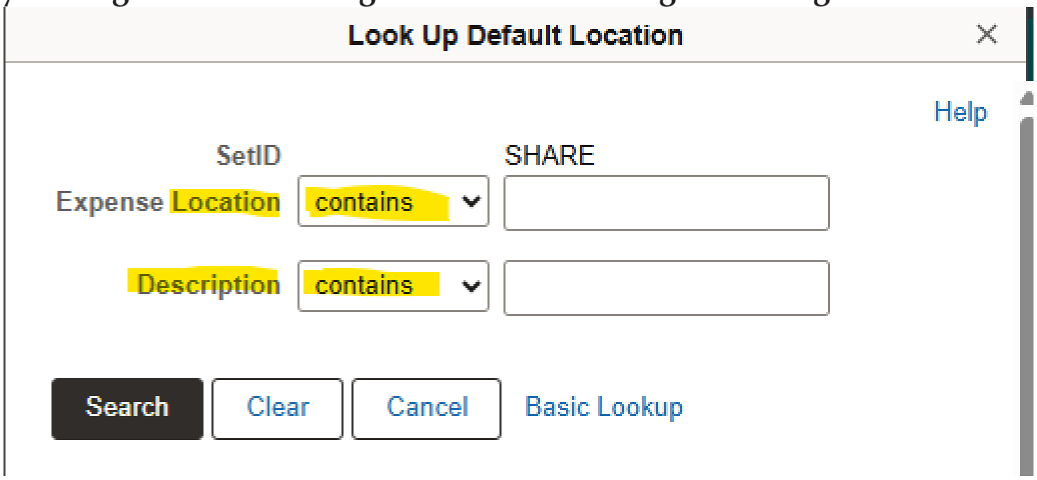
2) Search and select the Default Location (where you are traveling to)
   a. First, click on the magnifying glass in the Default Location field



   b. Click Advanced Lookup

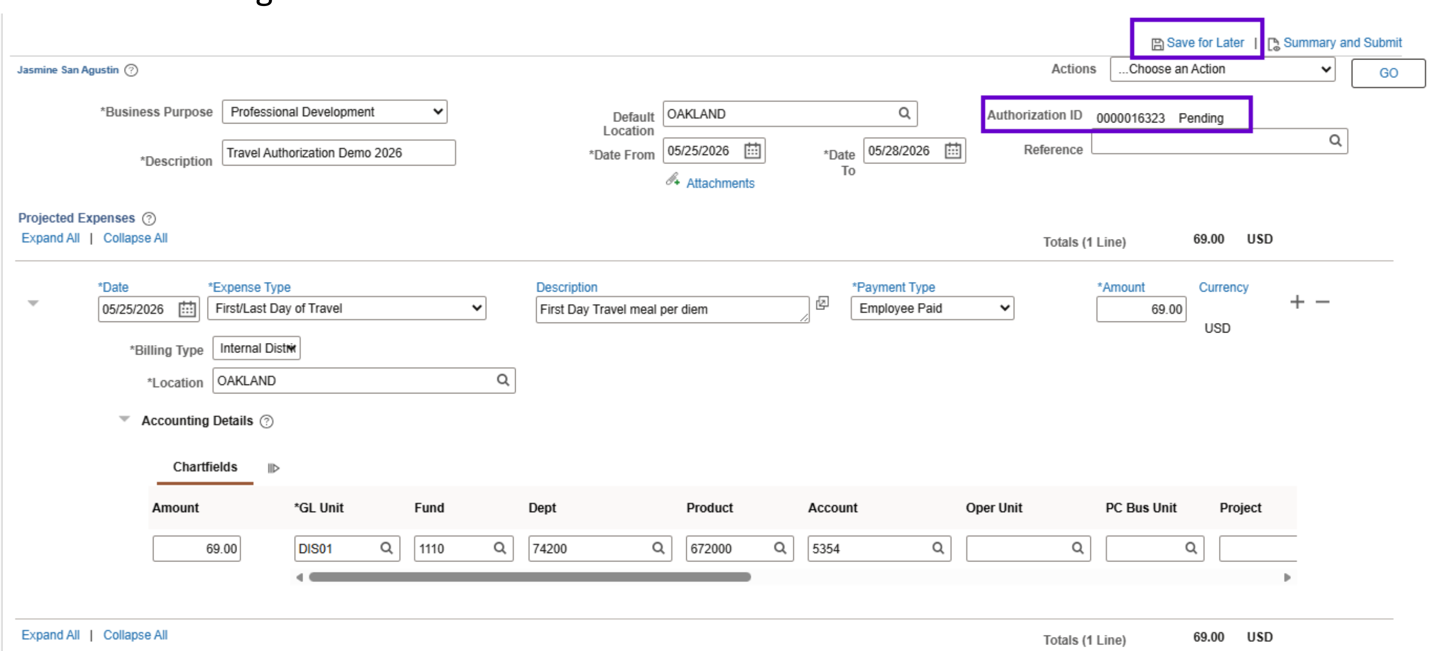


   c. You can search by the location (zip code of where the traveler will stay or where the conference is) OR by the name of the city.



*Tip: Change the drop-down menu to “contains” so the search will return all values.
*Note: Selecting the default location will automatically populate the meal per diem rates in the “*Amount” field per the [Government Services Administration (GSA) rates](), once they are selected under the “Expense Type” menu.

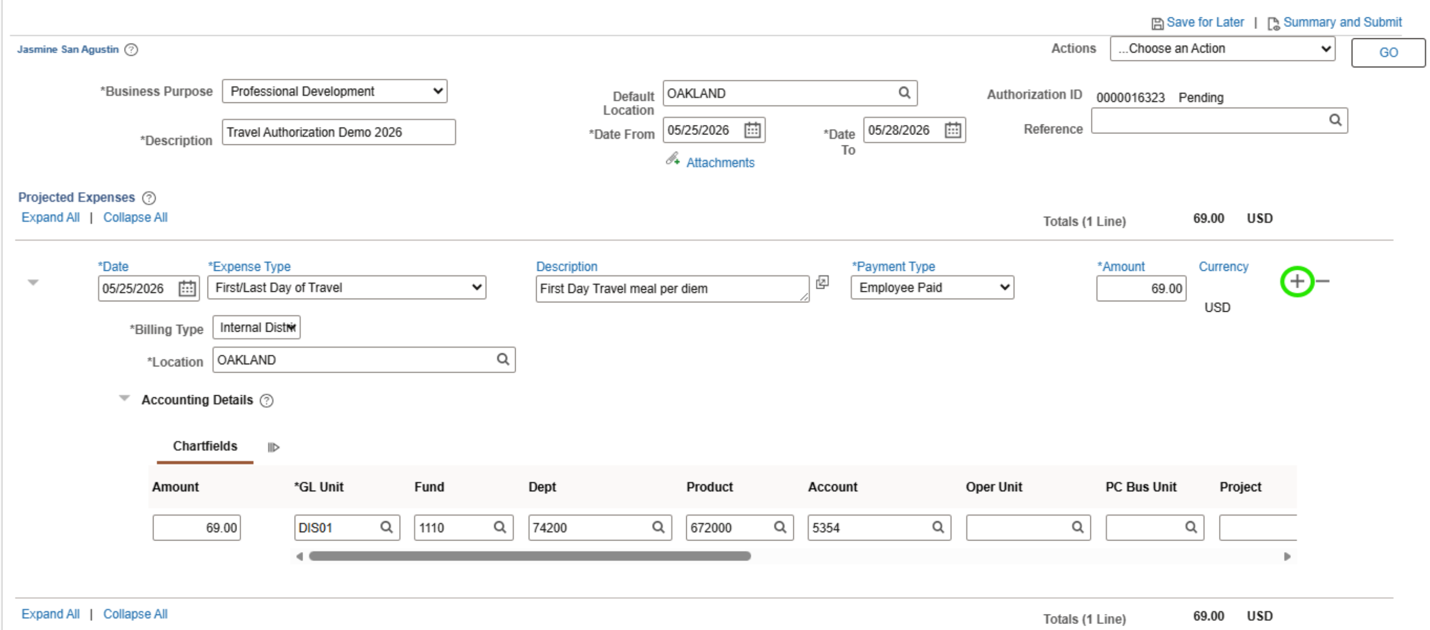
3) You will generate an Authorization ID (aka TA Number) only after adding one expense line and clicking “Save for Later.”



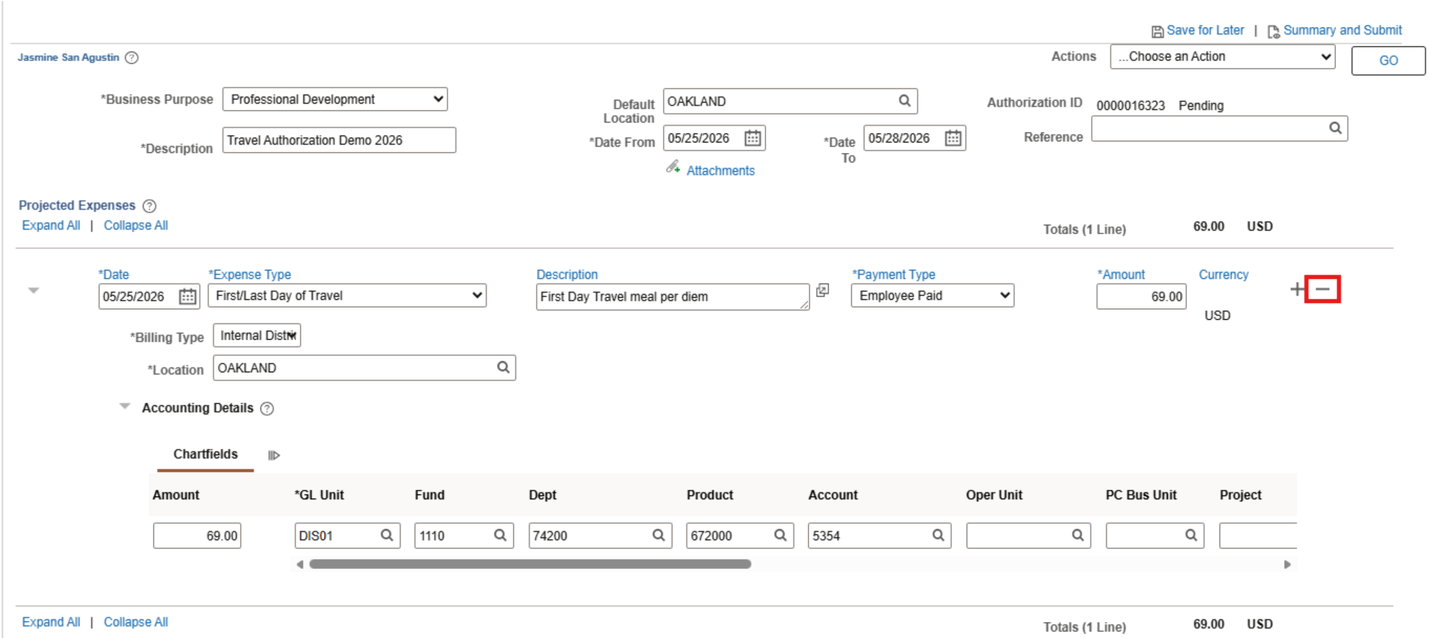
***Note: The status of a TA is “Pending” while it is being worked on.**

Now, you are ready to begin adding expense lines to your TA!

To add a new expense line, click the "+" sign:



To remove an expense line, click the "-" sign:



Expense Types

***Note:** Choosing an "Expense Type" will automatically populate the account code in the Chartfield. Therefore, there is no need to change or manually enter an account code.

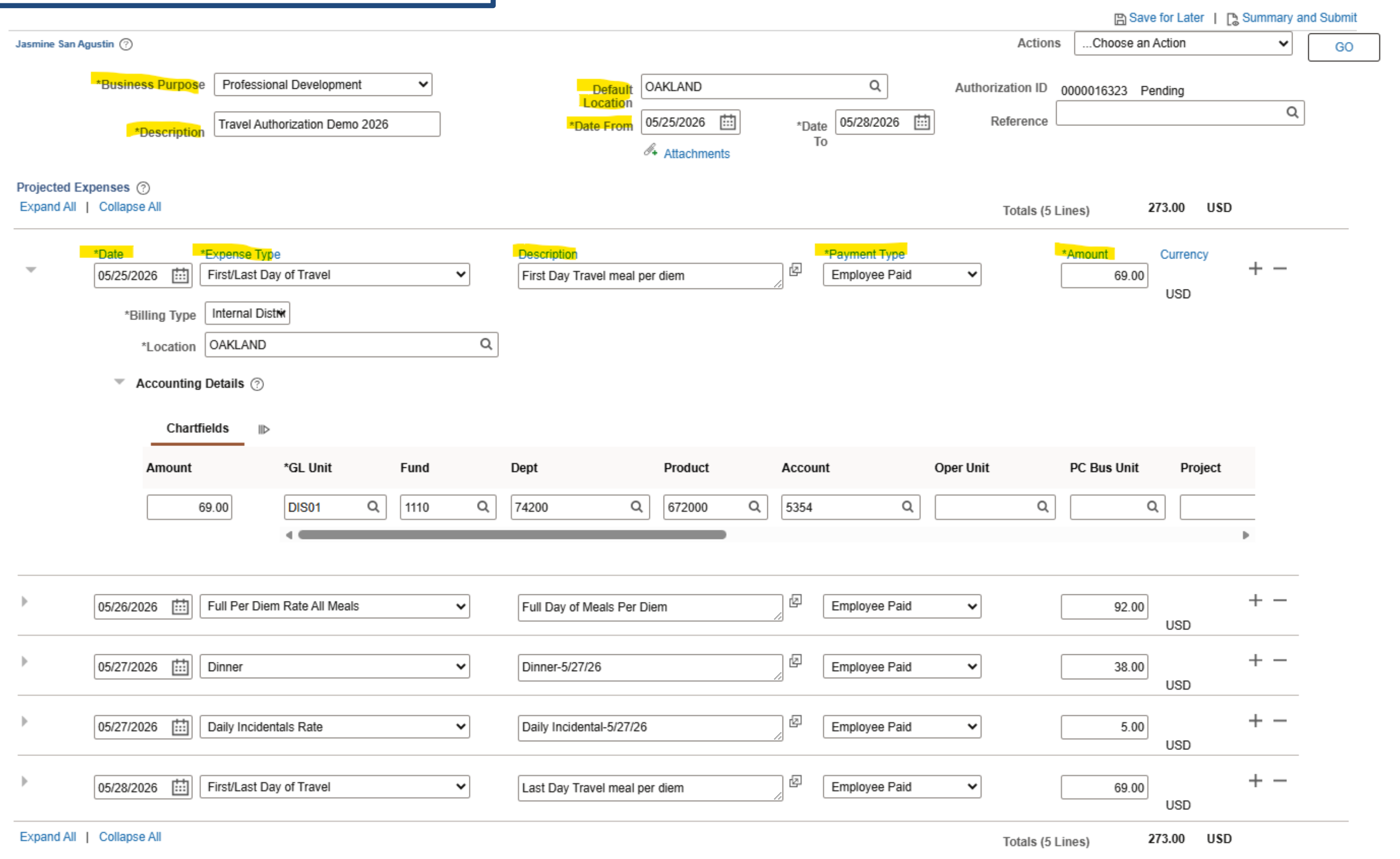
1) **Meal Per Diems**
   a) ***First/Last Day of Travel***
      i) This meal per diem is used twice in a travel authorization: Once on the first travel date and again on the last travel date.
      ii) The amount of this meal per diem is 75% of a full-day meal per diem. For example, if a full-day meal per diem is $100, the First/Last Day of Travel rate will be $75.00
      iii) This meal per diem includes the $5 Daily Incidental rate
      See the first and last lines in the screenshot on the next page, for example
      Rates are determined by GSA
   b) ***Full Per Diem Rate All Meals***
      i) This meal per diem is used when a conference does not provide meals, requiring the employee to pay for all meals out-of-pocket.
      ii) This meal per diem includes the $5 Daily Incidental rate
      See line two in the screenshot on the next page for example
      Rates are determined by GSA
   c) ***Itemizing Meals (Breakfast, Lunch, Dinner, Daily Incidental Rate)***
      i) Itemizing meal per diems happens when a conference only provides one or two meals, requiring the employee to pay out-of-pocket for the meal(s) not provided by the conference.
      ii) In this case, the employee must list the meals not covered on separate expense lines and a line for the daily incidental.
      iii) For example, if a conference provided breakfast and lunch, the employee is responsible for buying dinner. Therefore, the employee can include an expense line for dinner and a line for daily incidental expense on the day they paid for dinner.
      See the third and fourth lines in the screenshot on the next page for example

Notes about Per Diem expenses

-The “*Payment Type” for meal per diems is “Employee Paid”

-Receipts are not required for meals. Employees can be reimbursed up to the GSA per diem amount. Please reference Administrative Procedure (AP) 7400 regarding meal per diems.

Example of Meal Per Diem expense lines:



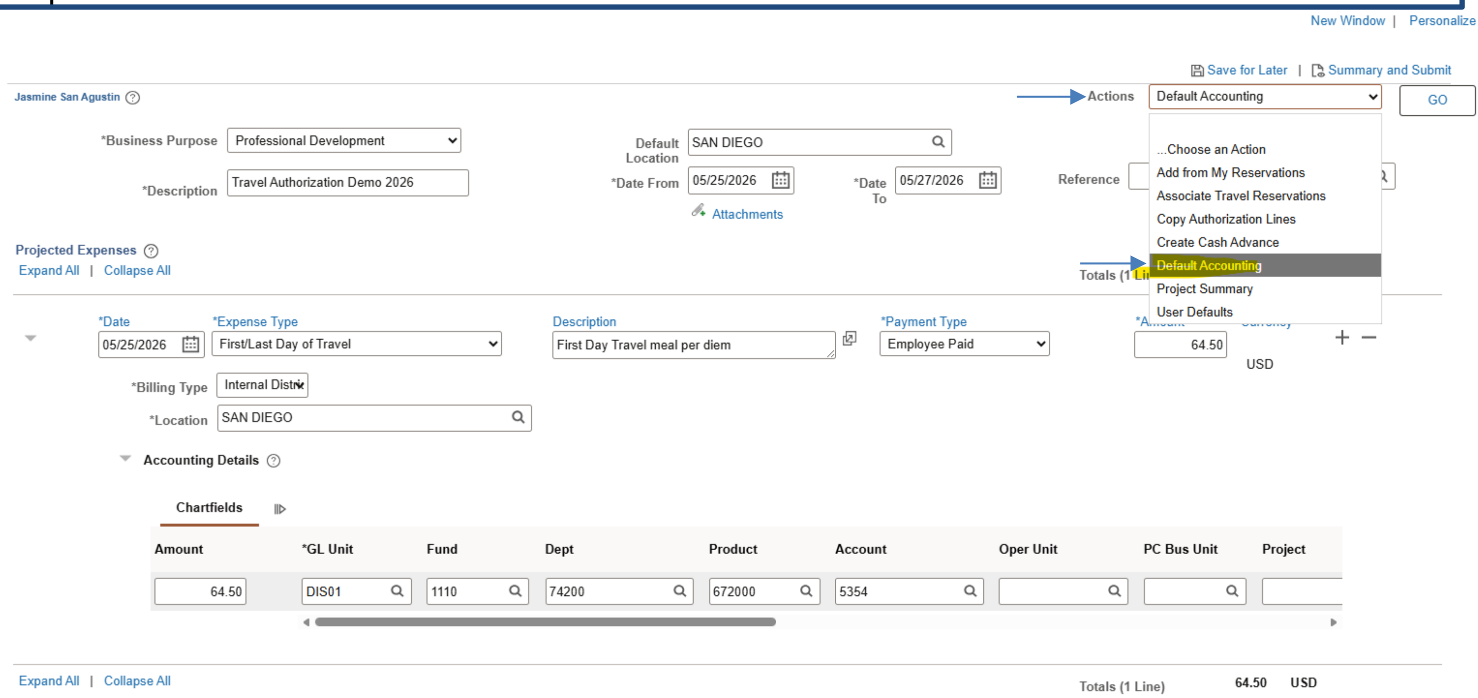
***Note**: The General Ledger (GL) budget string used above is only an example.

***Note**: Amounts listed are for demonstration purposes only.

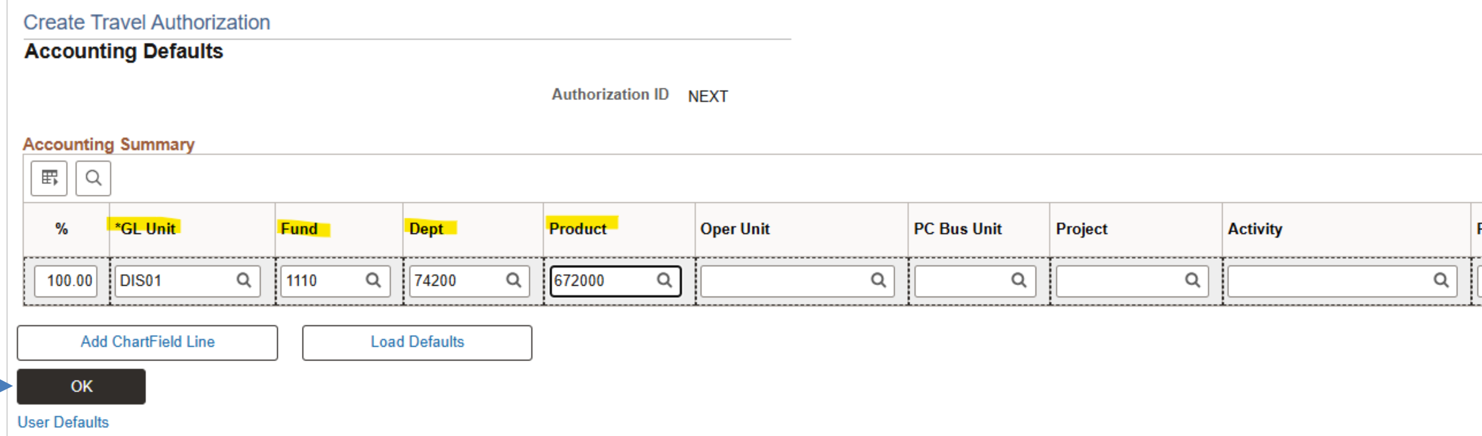
***Tip**: If the same GL budget string will be used throughout the travel authorization, you can use the “Default Accounting” option in the “Options” drop-down menu to enter the Business unit, Fund, Department, and Product codes of the GL string to automatically populate on a new expense line.

***Note**: You must add one expense line with the full GL string first before you can access the “Default Accounting” option.

To use the “Default Accounting” after entering one expense line with the GL string, follow these steps:



Next, enter <u>your approved GL budget string</u> and then click “OK.”:



2) <u>Transportation</u>

a) Air Travel

i) This expense type is for airfare. Select the "Payment Type" that was used to purchase the airline tickets.

ii) Although it is not required at this point, it is recommended to add your ticket number in the "Ticket Number" field. **This number will be required on the Expense Report.**

b) Automobile Mileage

i) Automobile mileage is reimbursable if the employee is driving their personal car and traveling 40 miles or more outside of San Diego County.

ii) A round-trip total of miles may be on one expense line. If so, make a note in the "*Description" box that the mileage is round-trip, **OR**
Travelers may have two separate lines, one for departure and one for return, for automobile mileage.

iii) Automobile Mileage calculates distance as:
From the employee's place of work (District Office, City College, Mesa College, Miramar College, College of Continuing Ed., etc) to the conference.

The automobile mileage rate is determined by the **<u>Internal Revenue Service</u>**

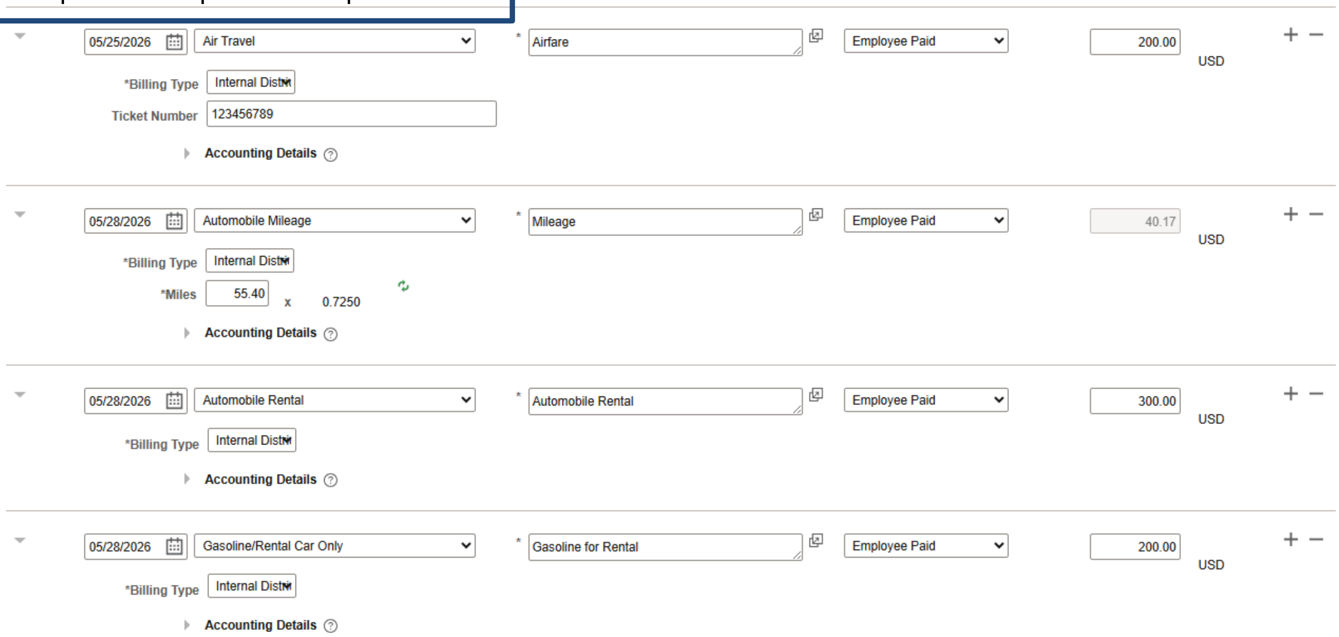
Please reference <u>page 8 of the AP 7400</u> for additional information about Automobile Mileage and distance calculations

c) Automobile Rental and Gasoline/Rental Car Only

i) Automobile rental from a carrier at an airport terminal for local transportation is reimbursable per <u>AP 7400.</u>

ii) Gasoline is reimbursed only for rental cars

Example of Transportation expense lines:



***Note**: The General Ledger (GL) budget string used above is only an example.

***Note**: Amounts listed are for demonstration purposes only.

3) **Hotel and Lodging**

a) This expense type records hotel fees, including taxes

b) Enter the number of nights you plan to stay at the hotel

c) The "*Nightly Rate" is equal to the Total Cost (including taxes)/Number of Nights

d) The "Payment Type" depends on who will pay for the lodging

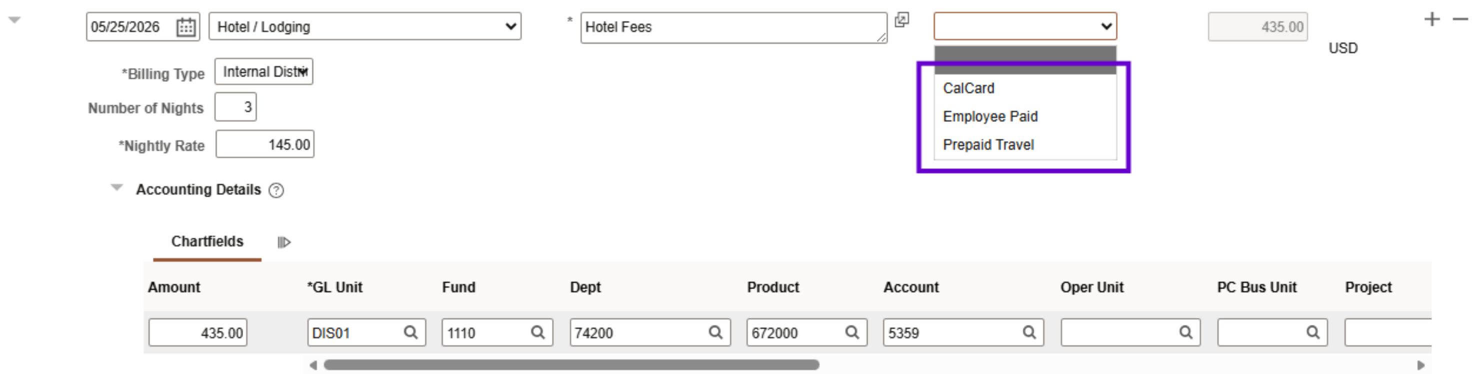
  i) If the employee is paying, choose "Employee Paid."

  ii) If the District is paying, choose "Prepaid Travel" if a Payment Request was submitted to have a check sent to the vendor

  iii) If the District is paying, choose "CalCard" if General Accounting paid via CalCard

e) Please reference page 5 of the AP 7400 for additional information

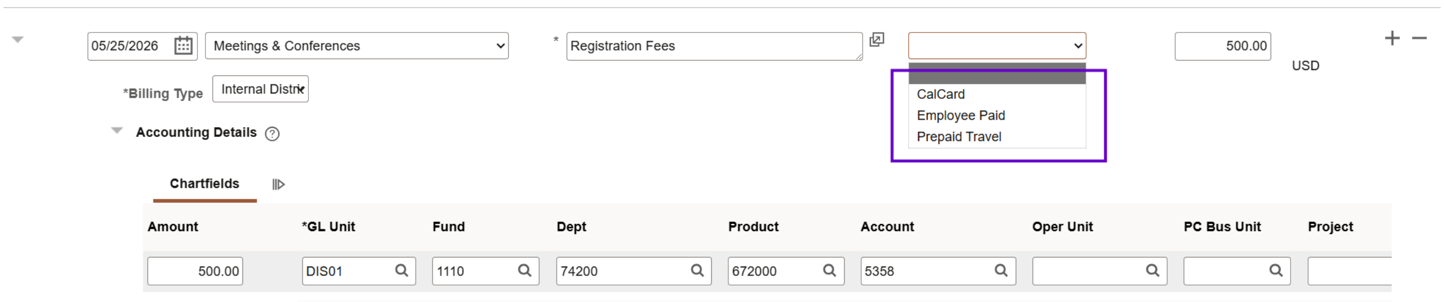
Example of Hotel/Lodging expense line:



***Note**: The General Ledger (GL) budget string used above is only an example.
***Note**: Amounts listed are for demonstration purposes only.

4) **Meetings and Conferences**
   a. This expense type records registration fees for conferences and trainings
   b. The "Payment Type" depends on who will pay for the registration fees. The same payment options from Hotel and Lodging apply here.
   c. Please reference page 6 of the AP 7400 for additional information

Example of Meetings and Conferences expense line:



***Note**: The General Ledger (GL) budget string used above is only an example.
***Note**: Amounts listed are for demonstration purposes only.

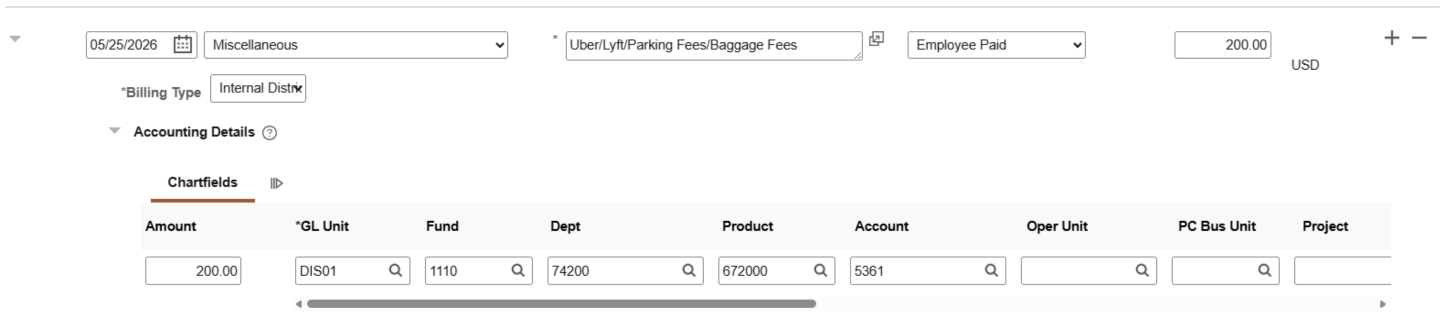
5) Miscellaneous

a. This expense type is used to record miscellaneous fees such as Uber, Lyft or Taxi fares, baggage fees, parking fees, toll fees, internet charges to conduct District business, etc.

b. Miscellaneous expenses are typically employee-paid fees.

c. Please reference [page 9 of the AP 7400]() for additional information

Example of Miscellaneous expense type:

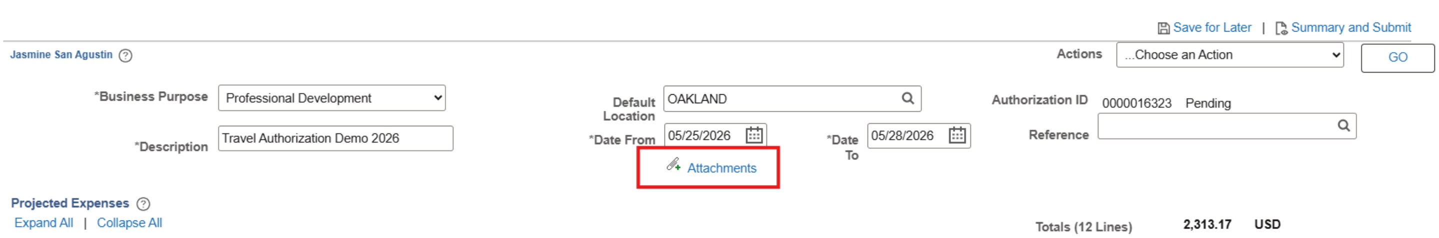


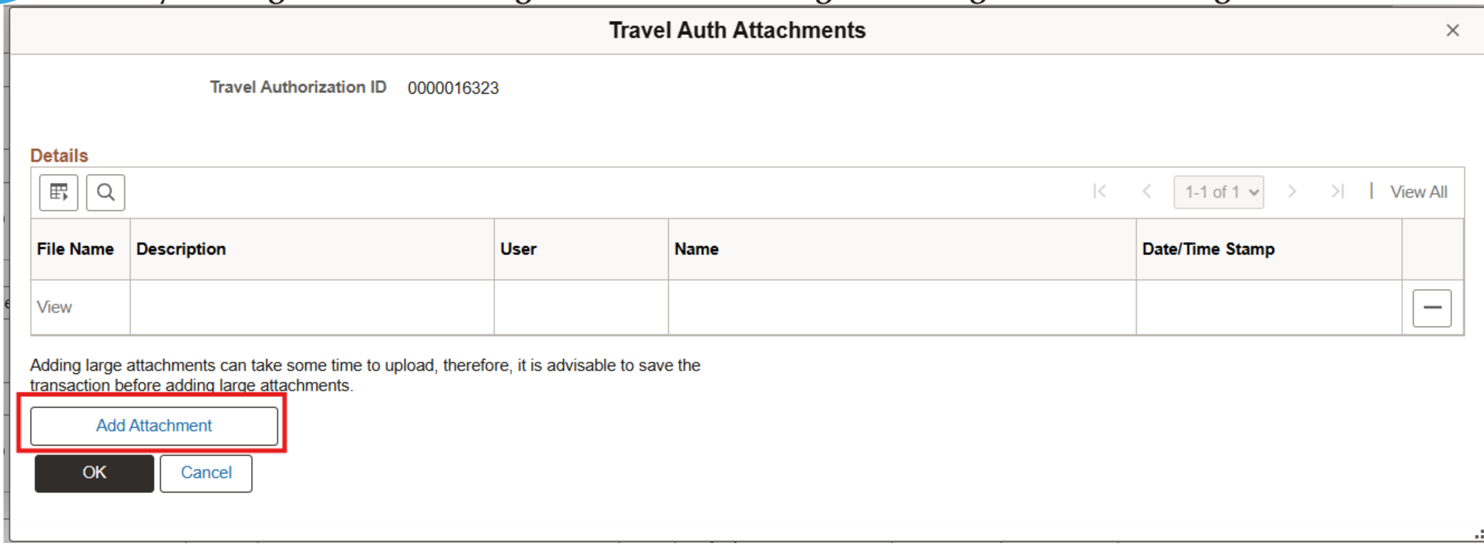
Adding Attachments

Attachments are required to show proof of purchase. This includes:

- Hotel folio (total that includes taxes and fees and number of nights)
- Airline ticket receipts (this may include the rental car fee if one is rented and baggage fees)
- Registration receipt
- Conference Agenda (to show what meals are provided)
- Rental Car receipts
- Google Map of travel to and from a conference (for mileage)

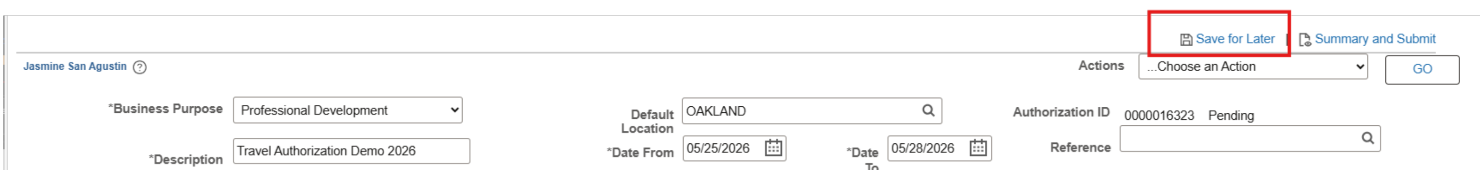
Combine all attachments into one PDF File and attach here:





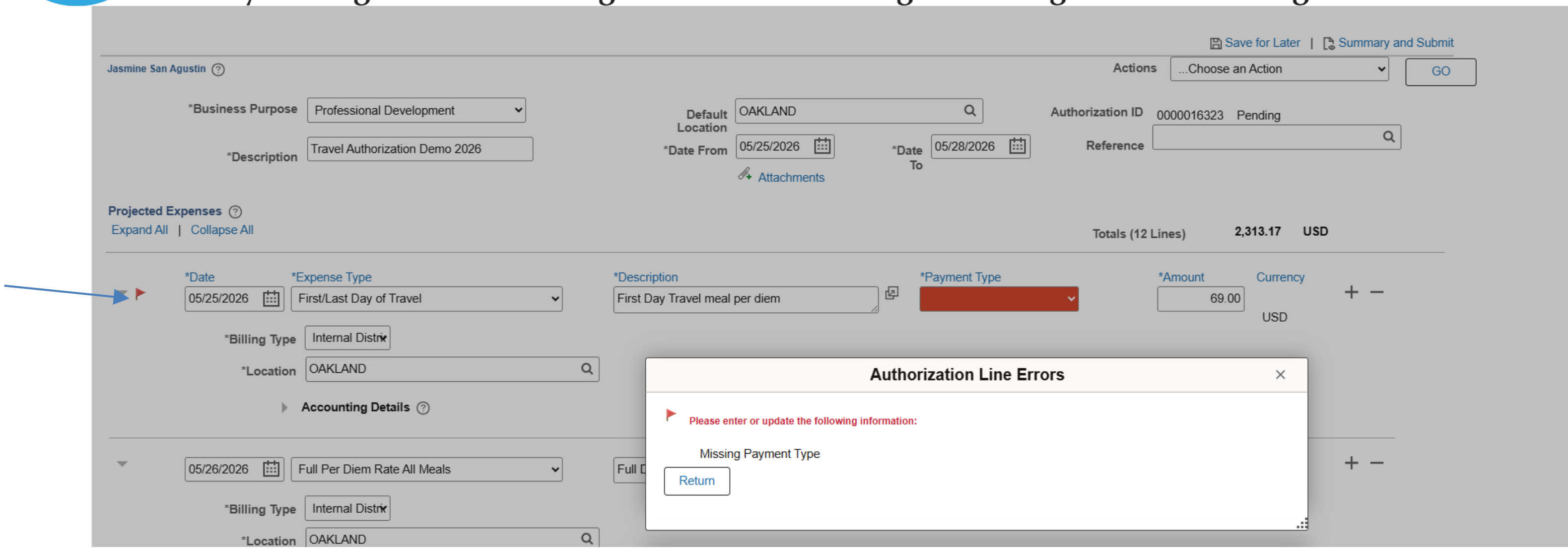
Save and Submit a Travel Authorization

After adding all the applicable expense lines and attaching the associated receipts, click “Save for Later” in the top-right corner of the screen.

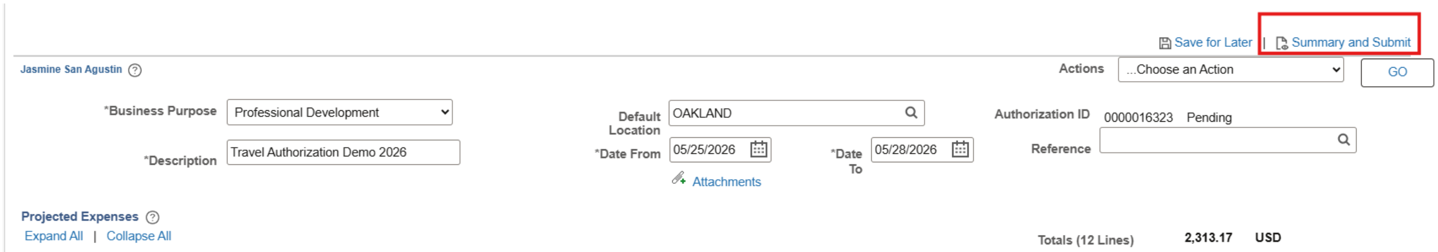


If any red flags appear, a correction to an expense line is required before it can be submitted successfully. Click on the red flag to view the error.

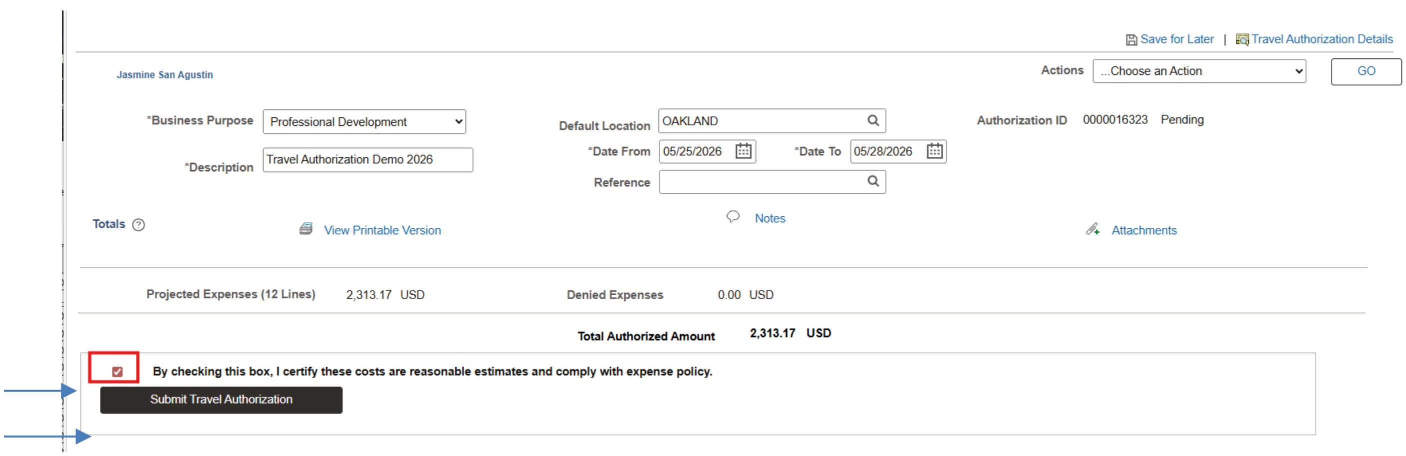
Example of a Red Flag that needs correction:

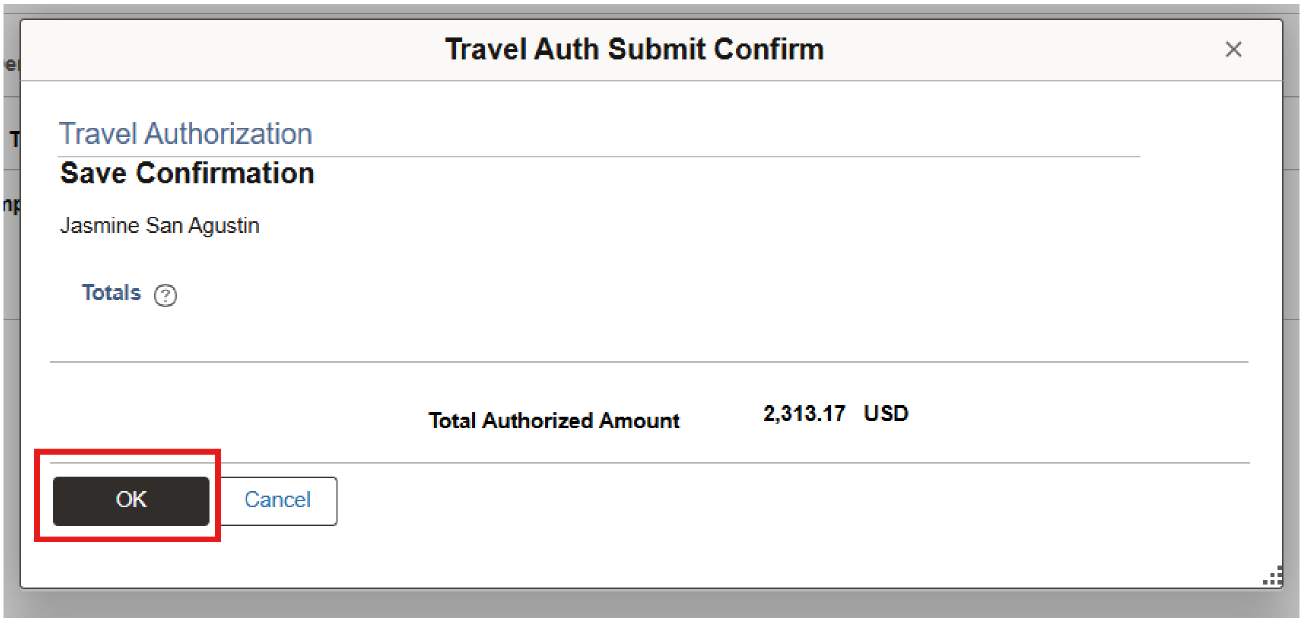

Save for Later | Summary and Submit
Jasmine San Agustin
Actions
...Choose an Action
GO
*Business Purpose
Professional Development
*Description
Travel Authorization Demo 2026
Default Location
OAKLAND
*Date From
05/25/2026
*Date To
05/28/2026
Attachments
Authorization ID
0000016323
Pending
Reference
Projected Expenses
Expand All | Collapse All
Totals (12 Lines)
2,313.17
USD
*Date
*Expense Type
*Description
*Payment Type
*Amount
Currency
05/25/2026
First/Last Day of Travel
First Day Travel meal per diem
69.00
USD
*Billing Type
Internal Distr
*Location
OAKLAND
Accounting Details
05/26/2026
Full Per Diem Rate All Meals
Authorization Line Errors
Please enter or update the following information:
Missing Payment Type
Return

If no red flags appear or you've cleared any flags, you can now "Save and Submit" your report:

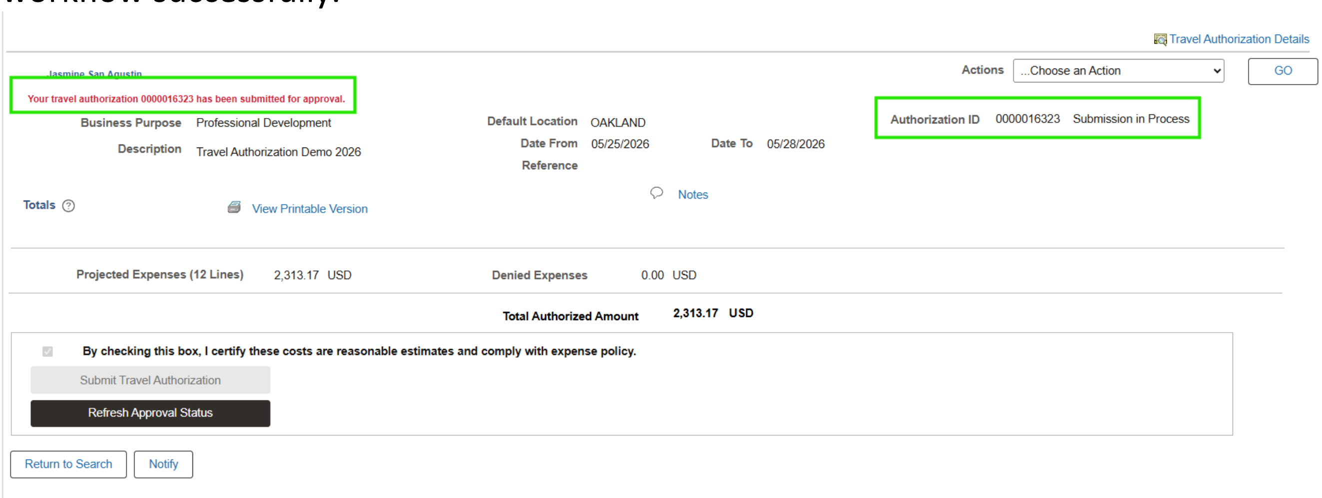


Check the box to certify that the costs are reasonable estimates and then click "Submit Travel Authorization."





If you see that the status of your TA is now “Submission in Process,” the TA was submitted into workflow successfully.



If you are returned to the main screen after clicking “OK” in the “Travel Auth Submit Confirm” box, that means additional corrections to expense lines need to be made. You will see red flags on those lines if this is the case. After they’ve been cleared, try submitting again.

Congratulations! You have successfully submitted your Travel Authorization!

Travel Authorization Frequently Asked Questions:

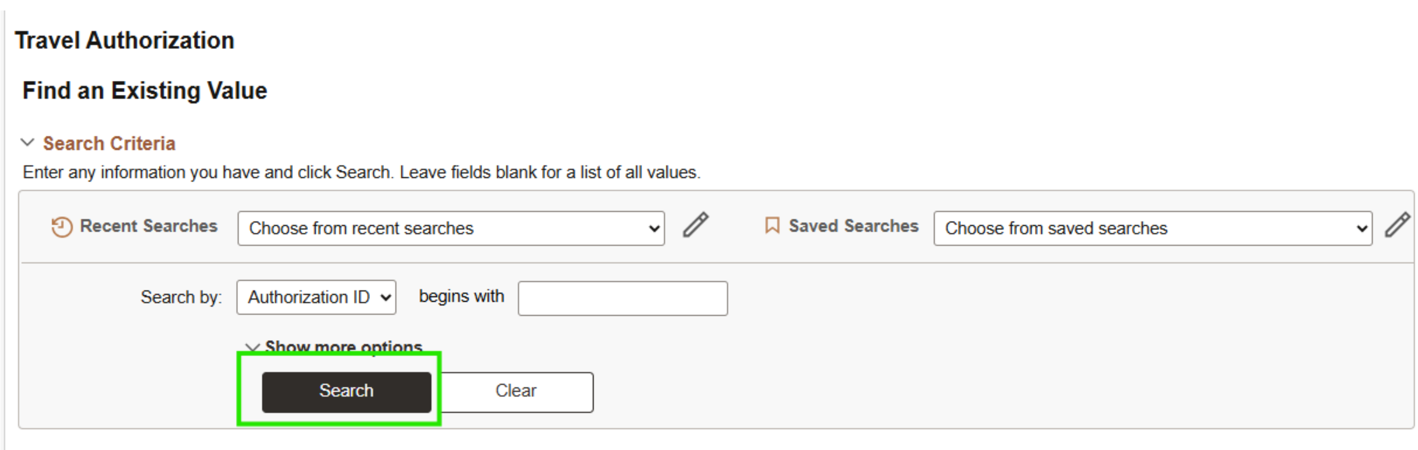
Q: What do the different payment types mean?
A: The different payment types mean:

Employee Paid-The employee paid for this expense out-of-pocket. Therefore, this expense will be reimbursed to the employee after an expense report is submitted.

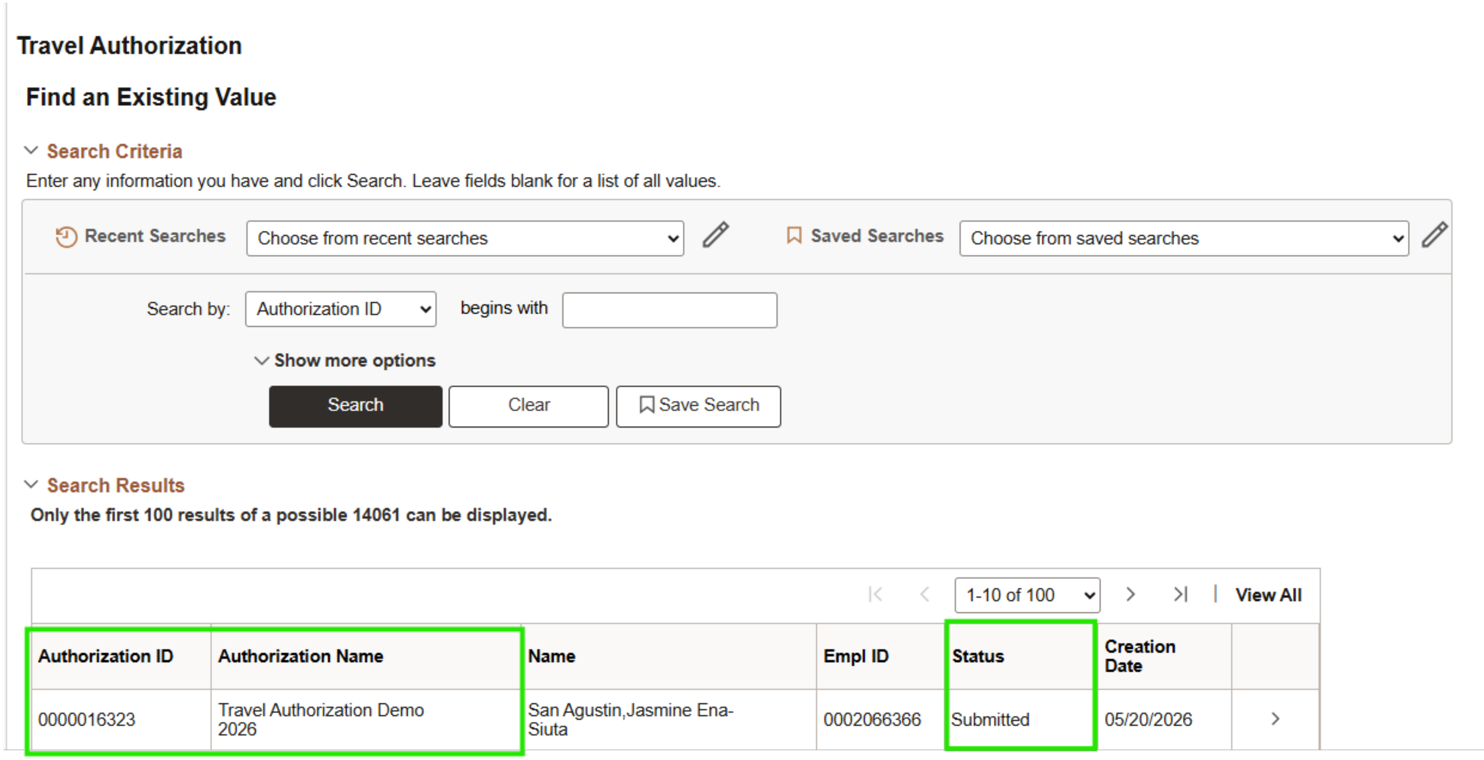
Prepaid Travel: The District is paying for this expense by check. After a TA is approved (must have the status "Approved"), the employee can fill out a payment request (Employee Self Service > Payment Request Center > Create) to generate a check for the hotel or conference vendor.

CalCard-The District is paying for this expense via District travel card. This option is only to be used IF the hotel and the conference vendors do not accept checks. The employee must have an approved TA on file first. Then, the employee is responsible for securing their own hotel, conference, and airline arrangements. Once payment is ready, they will reach out to District General Accounting to have the expenses paid.

Q: How do I know where in the approval flow my Travel Authorization is in?
A: Look at the status of your report first
Finance Dashboard> Travel & Expense >Travel and Expense Center>Travel Authorizations>3 More…>View
Click "Search" (without entering any data in the "Search by" field



A list of Travel Authorizations you've submitted will populate, and the most recently submitted TA will be at the top of the list. Click on the "Authorization ID" to view the TA and its status:


Travel Authorization

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Search by: Authorization ID begins with

Show more options

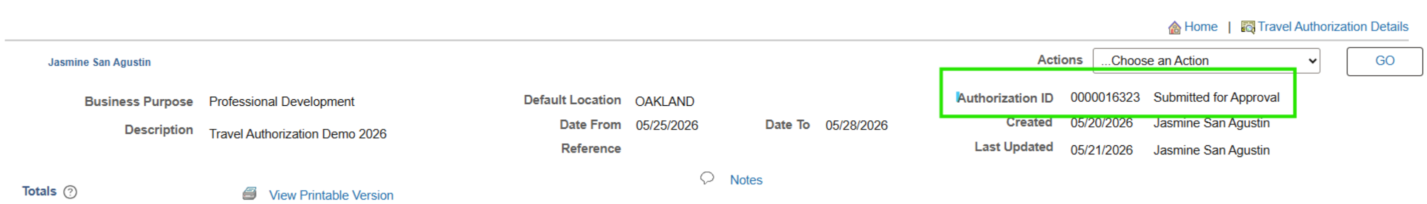
Search | Clear | Save Search

Search Results

Only the first 100 results of a possible 14061 can be displayed.

1-10 of 100 | View All

Authorization ID	Authorization Name	Name	Empl ID	Status	Creation Date
0000016323	Travel Authorization Demo 2026	San Agustin,Jasmine Ena-Siuta	0002066366	Submitted	05/20/2026


Home | Travel Authorization Details

Jasmine San Agustin

Actions: ...Choose an Action | GO

Business Purpose: Professional Development

Description: Travel Authorization Demo 2026

Default Location: OAKLAND

Date From: 05/25/2026 Date To: 05/28/2026

Reference

Authorization ID: 0000016323 Submitted for Approval

Created: 05/20/2026 Jasmine San Agustin

Last Updated: 05/21/2026 Jasmine San Agustin

Totals | View Printable Version | Notes

Status Meaning:

Pending-The TA is still in the creator's queue and needs to be submitted if the TA is complete and ready for approval.
Submitted for Approval-The TA is in the first approver's queue. This is where the TA needs to be budget checked. Once the first approver approves, it will flow to step two.
Approvals in Process-The TA is still going through the approval flow
Approved-The TA has been reviewed and approved by the last approver in the approval flow

Q: Who do I reach out to for assistance with my Travel Authorization?
A: Reach out to your travel liaison, executive assistant, or General Accounting for assistance.

Q: Who do I contact to find out where in the approval flow my report is?
A: Reach out to your travel liaison, executive assistant, or General Accounting for this information.

Q: How do I get reimbursed for travel expenses I paid out-of-pocket?
A: After the conference, you have 10 days to complete and submit an Expense Report to close out the TA. Reimbursable expenses will be paid via check after the Expense Report has been fully approved. A separate guide is available for Expense Reports.

Q: If a third party pays for an employee's travel expenses, does a Travel Authorization need to be submitted?
A: Yes, a travel authorization still needs to be submitted. An employee will submit a $0.01 TA, entering only one expense line for $0.01. This is so the travel authorization obtains approval from those in their approval flow and is covered by the District's travel insurance.

Q: What if an employee forgets to submit a travel authorization, and they have out-of-pocket expenses?
A: If an employee returns from their travel with expenses, they will submit an expense report without a travel authorization.
Note: *An employee should always have a travel authorization on file for any District business travel.*

Q: Can I submit a payment request or request accommodations to be paid via CalCard before I have an approved Travel Authorization on file?
A: No, a Travel Authorization must be approved before a payment request can be submitted or for expenses to be paid via CalCard.

Q: If travel happens at the end of June, and an employee returns to do their expense report after July, how do the expenses post back to the prior fiscal year?
A: At the end of the fiscal year, the District Office will post approved travel authorizations that happened at the end of June back to the prior fiscal year.

Q: Can an employee pay for expenses out of pocket and be reimbursed before the travel takes place?
A: No, the employee must wait to submit their expense report after they return from travel to receive their reimbursements.

Q: What's the standard practice for student travel?
A: If an employee is taking a group of students on a field trip or a business trip, the students and their expenses can be added to that employee's Travel Authorization. The employee must include a list of the student's names and their student IDs, and the employee can add expense lines that group all expenses together. For example, if the total group registration includes the employee and all students, then one expense line can be added for the total registration cost.

Q: What if a group of employees is traveling to the same conference together? Can they all be added to the same group registration? If so, do they all list the registration on their individual Travel Authorizations, or can one employee include the group registration on their TA alone?
A: Yes, a group of employees all going to a conference can be on the same registration payment on a payment request. In this case, one employee can add the group expense to their TA.

Q: What if I don't see the location listed in the "Default Location" menu?
A: Reach out to General Accounting or the Business Systems Analyst in Finance and Business Services to add the city, zip code, and meal per diems associated with the zip code.

Q: What if my only expense is mileage?
A: In this case, a Mileage-Only expense report can be submitted without a travel authorization.

Sources:

U.S. General Services Administration Meal Per Diem Breakdown:
https://www.gsa.gov/travel/plan-book/per-diem-rates

U.S. General Services Administration Update on IRS Mileage Rate:
https://www.gsa.gov/travel/plan-a-trip/transportation-airfare-rates-pov-rates/privately-owned-vehicle-pov-mileage-reimbursement

Administrative Procedure (AP) 7400-Travel
https://go.boarddocs.com/ca/sdccd/Board.nsf/goto?open&id=AQ5LYG58C0E4#