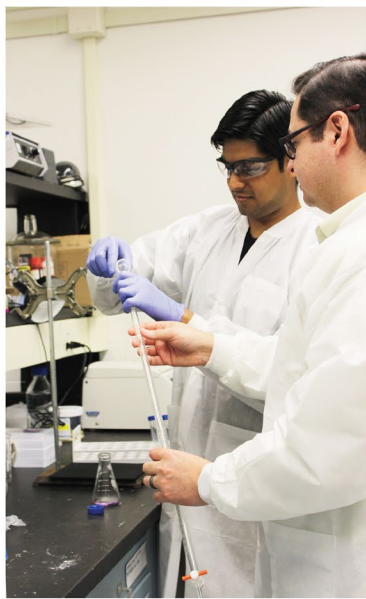


MY.ACES TRAVEL PORTAL

Request for Authorization to Travel (RAT) Guide



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Food Science & Human Nutrition
COLLEGE OF AGRICULTURAL, CONSUMER
& ENVIRONMENTAL SCIENCES

Traveling While a Graduate Student

- University of Illinois business travel must be pre-approved by the Department Head or authorized delegate. The policy includes graduate student travel.
- This presentation will provide instructions about how to submit a Request for Authorization to Travel (RAT), which is the mechanism we use for pre-approval.
- Only fill this form out for yourself. If someone else is traveling with you for the same event, they will also need to complete a RAT form.

Getting Started

- Access the my.ACES portal application at my.aces.illinois.edu
- Click Sign In, then click Illinois Login
- Enter NetID and password
- Hover over Financial Tools and click on Travel



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Begin the Request for Authorization to Travel

Travel - Request

Travel Requests | **My Travel Requests** | Reports | Setup | Proxy Request Form

Traveler: Reifsteck, Amanda D ▼ Fiscal Year: 2019 ▼ **Create Request**

n	Travel ID	Absences				Reimbursement			Dates			Section	Traveler	Supervisor
		University Travel	Consulting	Personal	Furlough	University	Non-University	Cash Advance	Departure Date	Return Date	Submit Date			
No Records Found														

- Click on the My Travel Requests tab
- Click Create Request to initiate the travel request in the my.ACES portal

Travel Wizard:

1 Personal Information

The screenshot shows a web form titled "Travel - Request". At the top, there are navigation tabs: "Travel Requests", "My Travel Requests", "Reports", "Setup", and "Proxy Request Form". Below these is a progress bar with four steps: "1 Personal Information" (highlighted in green), "2 Absence", "3 Teaching Assignments", and "4 Review & Submit". The form itself has a light blue header with the word "Type". Below this, there are three radio buttons: "University Personnel" (selected), "University Consultant/Vendor", and "Non Univ". Under the "Type" section, there is a "Traveler Information" section with two input fields: "Traveler" (containing the text "areifst") and "Phone" (empty). Below this is a "Supervisor (netID)" section with an empty input field. At the bottom of the form, there are two buttons: "Continue" and "Proxy Request Form".

- The type of traveler is University Personnel. Email a clarification request to FSHN-Accounting@mx.uillinois.edu if believed to be one of the other options.
- Enter your netID and phone number
- Supervisor is most likely your faculty advisor netID. If you are not sure email FSHN-Accounting@mx.uillinois.edu.

Travel Wizard: 2 Absence

The screenshot shows a web form titled "Travel - Request". At the top, there are tabs for "Travel Requests", "My Travel Requests", "Reports", "Setup", and "Proxy Request Form". Below these are four steps: "1 Personal Information", "2 Absence" (highlighted in green), "3 Teaching Assignments", and "4 Review & Submit". The "2 Absence" section contains the following fields:

- Category of Absence:** Three checkboxes: ☐ University Travel, ☐ Consulting, and ☐ Personal.
- Begin Date:** A text box containing "06/20/2019".
- End Date:** A text box containing "06/20/2019".
- Description of Absence/Purpose of Travel:** A large, empty text area.

At the bottom left of the form is a "Continue" button.

- Category of Absence will be University Travel
- Add Begin and End Dates of travel
- ***IMPORANT*** Add the **detailed** reason for your travel. University Payables requires information about **why** the travel is taking place and **how it benefits** the University. Vague explanations will delay RAT approval or travel reimbursement.
 - [Click here for examples of a detailed business purpose](#)
- If this travel includes Grad Travel Award funding, please include description after detailed business reason, that this “*includes Travel Award funding of \$500*” for example.

Travel Wizard:

3 Destination(s)

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information | 2 Absence | **3 Destination(s)** | 4 Reimbursement | 5 Accounts | 6 Teaching Assignment

Destination

Place

City State/Province Country

Do you require travel or lodging purchased by your Office Support Staff and/or a Travel Advance?
☐ Yes ☒ No

Documents and Materials (Optional) [New](#)

File Name	File Type	Size	Action
No Records Found. Click 'New' to upload a Document.			

[Continue](#)

- Enter travel destination Place, City, State, and Country.
- Answer No to the question “Do you require travel or lodging purchased by your Office Support Staff and/or a Travel Advance?”.
- If purchase of transportation or lodging will be requested, email Victoria Roth (vprice2@illinois.edu) and cc [Audra Martin](#) (mart@illinois.edu) in the FSHN Business Office once your RAT form is approved.

Travel Wizard:

3 Destination(s) (continued)

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information > 2 Absence > **3 Destination(s)** > 4 Reimbursement > 5 Accounts > 6 Teaching Assignments

Destination

Place

City State/Province Country

Do you require travel or lodging purchased by your Office Support Staff and/or a Travel Advance?
☐ Yes ☒ No

Documents and Materials (Optional) [New](#)

File Name	File Type	Size	Action
No Records Found. Click 'New' to upload a Document.			

[Continue](#)

IMPORTANT University Payables requires a copy of the conference brochure or meeting invitation and the agenda of the event that will be attended. The RAT may be declined, or travel reimbursement will be delayed if these items are not provided.

- Under Documents and Materials (Optional) – ***this is not optional***. The following information should be uploaded:
 - Conference brochure or meeting invitation with dates and location
 - Listing of the conference recommended hotel accommodations with rates
 - Agenda (if applicable)
 - Invitation letter (if applicable)
 - Travel Award letter (if applicable)

Travel Wizard:

4 Reimbursement

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information > 2 Absence > 3 Destination(s) > **4 Reimbursement** > 5 Accounts > 6 Teaching Assignments

Are you expecting to be reimbursed by the University? ☐ Yes ☒ No

Total Estimated Cost of Trip

Do you expect reimbursement from a Non-University of Illinois source? ☐ Yes ☒ No

Source	Amount	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Is cash advance required? ☐ Yes ☒ No

Desired Amount

Circumstance that warrants a cash advance

- “Are you expecting to be reimbursed by the University?” This screen defaults to the answer No. If it is not changed to Yes, the system will not allow a future screen to accept necessary information and the RAT will not move forward for approval.
- If travel is to be paid by the University, whether by reimbursement to the traveler or FSHN Business Office credit card (T-Card), answer **Yes** to “Are you expecting to be reimbursed by the University?”
- Important: While traveling, you may only pay out of pocket for your **own** expenses, and be reimbursed after travel, according to University Policy. Do not pay for anyone else's registration, lodging, or airfare with your own money. If assistance is needed paying for travel expenses, contact the Business Office.

Travel Wizard:

4 Reimbursement (Cont.)

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information > 2 Absence > 3 Destination(s) > **4 Reimbursement** > 5 Accounts > 6 Teaching Assignments

Are you expecting to be reimbursed by the University? ☐ Yes ☒ No

Total Estimated Cost of Trip

Do you expect reimbursement from a Non-University of Illinois source? ☐ Yes ☒ No

Source Amount

Is cash advance required? ☐ Yes ☒ No

Desired Amount

Circumstance that warrants a cash advance

- Add the estimated (or actual) total cost of the travel
 - Costs to consider: airfare, lodging, taxi/uber rides, shuttles
- “Is cash advance required?” This answer defaults to No. The University has very strict policies about when an advance can be provided. Contact FSHN-Accounting@mx.uillinois.edu if there are questions regarding this policy.

Travel Wizard: 5 Accounts

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information > 2 Absence > 3 Destination(s) > 4 Reimbursement > **5 Accounts** > 6 Teaching Assignments >

Index	Chart	Fund	Organization	Program	Activity	Valid	Designate Amount	Comment	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

- Enter the University Chart, Fund, Organization, and Program (CFOP) in which the travel expenses will be reimbursed. This number can be provided by the faculty member that has requested you attend an event.
 - Chart = 1, Fund = 1st 6-digit number in the CFOP string, Organization = 2nd 6-digit #, Program = 3rd 6 digit #
 - Ex: 1 (chart) – 100022 (fund) – 698000 (organization) – 698012 (program) *Activity code not required
- A message may pop up on the screen that states the CFOP provided does not match the appointment CFOP. That is fine, click continue and move on.
- *****IMPORTANT***** The FSHN Business office may not be able to pay in advance for any travel related expenses if travel scholarship funds will be provided. Contact FSHN-Accounting@mx.uillinois.edu for further information.

Travel Wizard: 6 Teaching Assignments

Travel - Request

Travel Requests | My Travel Requests | Reports | Setup | Proxy Request Form

1 Personal Information > 2 Absence > 3 Destination(s) > 4 Reimbursement > 5 Accounts > **6 Teaching As**

Below is a list of classes you will miss while away according to your teaching assignments recorded in Banner. You must provide for make-up classes, substitute lecturers, or account for the class time in some way.
Note: If you do not have any conflicts, please make a note of it in the Comment Box below!

n	CRN	Subject	Course	Section	Type	Date	Start Time	End Time	Arrangements
No Conflicts Found									

Please detail any further conflict that are not listed above.

- If a teaching assistantship is held, list in the comment box the courses and times teaching will be missed, how the assignment will be covered, and confirmation that approval has been received from the instructor of the course.
- If there are no conflicts or teaching assignments enter N/A in the comment box.

Travel Wizard:

7 Review and Submit

- Review all of the information entered to this point. If changes are needed, revisit the appropriate section and edit the information.
- *****IMPORTANT***** Once Submit Request is clicked at the bottom of the page the traveler cannot edit or add information. If any information is incorrect or should be added, notify FSHN-Accounting@mx.uillinois.edu with the correct information or addition. The department approver will make the requested edit(s) or addition(s) to the RAT.

Travel Wizard: Completed YOU DID IT!!!!

- Once you have completed the RAT, approval progress can be viewed from the My Travel Requests tab by clicking on View in the action field on the right side of the screen.

8/6/2019	8/6/2019	8/6/2019	complete	Submitted	Pending	Pending	NA	Pending	View
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- When Supervisor Approval and Account Approval boxes are green, the FSHN Business Office may be contacted to pay for transportation or lodging arrangements on the T-Card. Email Victoria Roth (vprice2@illinois.edu) and cc Audra Martin (mart@illinois.edu) for assistance.

Travel - Request					
	Travel Requests	My Travel Requests	Reports	Setup	Proxy Request Form
	Submitted	Supervisor Approval	Account Approval	Academic Approval	P
Status	Submitted	Pending	Pending	N/A	
Name	Reifsteck, Amanda D	Alexander, Leslie Amber			
Date	6/20/2019				
Time	3:49:30 PM				

If you have questions, concerns, or need help, contact FSHN-Accounting@mx.uillinois.edu.