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HOMEPAGE DASHBOARD

1. **Black Menu Bar** – Contains all modules available to the user
2. **Profile Drop-Down Menu** – Contains access to Profile Settings, Sign Out, and “Acting as myself/another user”
3. **Quick Task Bar** – Snapshot of open Approvals, Requests, Expenses, Reports, and Cash Advances (if applicable)
4. **Alerts** – Provides tips, UF GO alerts, and unused ticket credit information
5. **Company Notes** – Contains UF specific alerts and World Travel Service (WTS) contact information
6. **Trip Search** – Portal to the Travel module (booking tool)
7. **My Trips** – Reservations for upcoming trips
8. **My Tasks**
   a. **Required Approvals** – Pending Requests, Reports, and Cash Advances
   b. **Available Expenses** – Unassigned card charges and expenses
   c. **Open Reports** – Unsubmitted Reports

**FOR ADDITIONAL ASSISTANCE**

**Technical Issues**
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

**Travel Policies and Directives**
Travel Office
352-392-1241
travel@ufl.edu

**PCard Policies & Questions**
PCard Team
(352) 392-1331
pcard@ufl.edu
FIRST TIME LOGIN - UPDATING YOUR UF GO USER PROFILE

To obtain system access, a user must take one of two possible trainings:

- **UGO100 – Introduction to UF GO**: access is auto-granted 24 – 48 hours after course completion. The course is designed for standard users, delegates, and supervisors

  OR

- **UGO200 – What an Approver Needs to Know**: a DSA must request the UF_N_TPS_APPROVER security role. This course is designed for financial approvers or any delegate approver (for supervisor or financial approver)

**NAVIGATION**

Access UF GO via **ONE.UF, myUFL, or the SAP Concur mobile app**

- **ONE.UF**: Log in to https://one.ufl.edu > Select **UF GO** under the Faculty/Staff section.
- **myUFL**: my.ufl.edu > My Self Service > **UF GO Travel and PCard**

**LOGGING IN**

1. Enter gatorlink@ufl.edu and click **Next**

2. Click **Sign in with University of Florida SSO**

3. Enter **UF gatorlink and password**

   Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip
PROFILE
The UF GO profile gives you the opportunity to provide detailed information to enhance your user information. Most of this information is optional. In this guide, essential information is highlighted for users to maximize their experience when using the Travel (booking) module.

STEPS
1. In the upper right-hand corner, select Profile
2. Click on Profile Settings
3. Select Personal Information from the Profile Options menu.
   Note: For a tutorial on how to fill out your Profile, watch this video.
   a. Name: Verify the first and last name listed match your government-issued photo ID you use for travel
      • If your ID contains a middle name, include it in UF GO
      • If you need to update your first or last name, contact Human Resources
      Alert! Do not make flight reservations using the online UF GO booking tool if your name is incorrect. Contact World Travel Service at (865) 288-1901 and an agent can assist in completing your booking under a different name.
   b. Email Address: Click Verify to verify your UF email address.

A verification code will be sent to the email. Follow the instructions provided to complete the process.

   • Email address verification ensures the system can send you trip itinerary, notifications, and receipts
   • You can only complete this step 24 – 48 hours after training is completed
   Tip! If you plan on sending receipts from a personal email, add that email address.
   c. Work/Home Phone Number: Specify home or work phone for the profile to be considered complete
   d. Travel Programs: Enter travel/rewards programs to be given credit for your bookings through UF GO
   e. Credit Card: Add your UF PCard and/or personal credit card information to book airfare, car rental, hotel, and or rail. Only the last 4 digits of the card number will be visible once entered. The UF Air Card is integrated in the booking tool but won’t be visible in this section
**MANAGE DELEGATES**

A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as filling out a Travel Request or preparing an Expense Report (travel, PCard, General Reimbursement). As a user, you can add or remove delegates in your profile. A delegate cannot add themselves to a user’s profile.

**Tip!** If you are unsure who your appropriate delegate should be, contact your unit’s fiscal team.

**NAVIGATION**

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**LOGGING IN**

1. Enter gatorlink@ufl.edu and click **Next**
2. Click **Sign in with University of Florida SSO**
3. Enter **UF gatorlink** and **password**

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

**DELEGATES**

**STEPS**

1. In the upper right-hand corner, select **Profile**
2. Click on **Profile Settings**
3. Select **Request Delegates** or **Expense Delegates** options from the menu on the left (updates made to one list will automatically update the other)
4. Click **Add** then enter and select your desired delegate’s name, UFID, or email address
5. Select the permissions you would like to assign the delegate

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<th>Can Book Travel</th>
<th>Can Submit Requests</th>
<th>Can Submit Reports</th>
<th>Can View Receipts</th>
<th>Can Use Reporting</th>
<th>Receives Emails</th>
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- **Can Prepare**: The delegate may prepare Travel Requests and Expense Reports on the user’s behalf.
- **Can Book Travel**: Can book trips on behalf of a user.
- **Can Submit Reports/Requests**: This gives delegate the ability to trigger notification email that a request or expense report is ready for the user to submit.
- **Can View Receipts**: Allows Delegate to view your receipts in UF GO (e-receipts, receipts images, etc.). This box auto-checks if “Can Prepare” is selected.
- **Receives Emails**: Allows delegate to receive a copy of the user’s emails.

**Alert!** Approver delegates can only be assigned by contacting the travel office. They must have completed UGO200 and requested the role in order to have appropriate access.

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**FOR ADDITIONAL ASSISTANCE**

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ACT AS A DELEGATE

A delegate is a user who is granted permission to act on behalf of another user to perform tasks, such as preparing a Travel Request, Expense Reports, and/or book a trip. While delegates can prepare transactions, they cannot submit on behalf of another user. For information on how a traveler or approver can designate a delegate, refer to the Manage Delegates guide.

NAVIGATION

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- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

ACT AS A DELEGATE

STEPS

1. Click the Profile drop-down button in the upper right-hand corner of the dashboard
2. Select the A Delegate for another user who has granted you this permission option
3. Search for the person on whose behalf you want to act by entering their last name, UFID, or email address and selecting the appropriate user from the list
4. Click on the Switch button
   You are now acting as a delegate for the selected user and can prepare requests/reports, and/or book travel
5. Repeat as needed

END DELEGATE SESSION

1. Click the Profile button and then click the Switch button

Tip! When accessing a user’s account as a delegate, verify that “Acting as” replaces “Profile” in the upper right-hand corner.
ACTIVATE E-RECEIPTS

E-receipts are electronic receipt images sent to Concur directly from a participating vendor. E-receipts can be found under the Available Expenses section.

NAVIGATION

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3. Enter UF gatorlink and password

**Note**: If you are already signed-in to myUFL or other UF system, this step will automatically skip

E-RECEIPT ACTIVATION

STEPS

1. Select Profile, in the upper right-hand corner
2. Click on Profile Settings
3. Locate Other Settings in the Profile Options screen

![Other Settings]

4. Click on E-Receipt Activation under Other Settings
5. Click Enable on the E-Receipt Activation screen

![E-Receipt Activation]

6. Click I Agree to enable, or I Disagree to decline

To disable, click the Disable link in the E-Receipt Activation screen.

FOR ADDITIONAL ASSISTANCE

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REQUESTS
CREATE AND SUBMIT DOMESTIC TRAVEL REQUEST

The Request module is used to plan, organize, and request approvals for UF business travel. A Travel Request provides a general estimate or plan for your trip including anticipated costs to UF. An approved Request is required for all UF business travel including trips partially or wholly paid by a third party (even when self-funded).

NAVIGATION

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- **ONE.UF**: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section
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3. Enter UF gatorlink and password

   **Note**: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

CREATE A TRAVEL REQUEST

**Tip!** If you are a delegate preparing a request for a traveler, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

**STEPS**

1. Click Request and then click Create New Request
2. Select the UFLOR Domestic Travel Request option in the Request Type drop down

   ![Create New Request]

3. Complete the required (red asterisk) and optional fields as needed
A. **Request Name** – Provide a description of the trip that is recognizable to the traveler and approver and may be used as a searchable identifier later

B. **Trip Type** – Indicate if it is an in-state, out-of-state, or international trip

C. **Traveler Type** – Indicate if the traveler is an employee, a guest, emeritus, non-employee, UF GO associate

D. **Business Purpose** – Select reason for trip, if your choice is not listed select one that comes closest

E. **Benefit to Grant or University** – Describe how the expense directly benefits the funding source

F. **Business Travel Start/End Date** – Select date the trip begins and ends

G. **Final Destination Location** – Start typing the city name and select appropriate city and country. If your city is not listed, select the closest and contact the Travel Office to have the correct city added to the list

H. **Will this trip include personal travel?** – Select Yes or No

I. **Personal Travel Dates** – Complete this field if selected Yes on personal travel

J. **Are You Taking UF Property?** – Yes or No

K. **Is this trip partially or fully paid by a Third Party?** – Select Yes or No

4. Complete Chartfield information. Click in the field to select an option or start typing and click on item to add

   ![Chartfield Information](image)

   L. **Business Unit** – Select UFLOL or UFFND

   M. **Department** – Select based on Department ID that is paying for the trip

   N. **Fund** – Select appropriate 3-digit fund code and description (ex. 101, 102, 201, 211, etc.)

   O. **Program** – Select appropriate program code based on the Chartfield string being used to cover the trip

   P. **Budget Reference** – Select Carry Forward or Current Budget

   Q. **Source of Funds** – Required for grant funds or transfers from component units

   R. **Flex** – Optional, based on a department’s use to classify an expenditure at a more granular level

   S. **UFID** – Optional, based on a department’s use to classify an expenditure at a more granular level

   T. **Project ID** – Required for project-based funds (grants or non-grant)

   U. **CRIS Code** – Only used by IFAS for federal reporting requirements

   V. **Comment** – Optional, departments can enter additional information not already collected. Viewable by users, delegates, supervisors, and financial approvers

5. Click **Create**

   **Note**: The system will save a draft if the **Request Name** and **Start and End Dates** fields are complete. All other fields can be completed later but before submission can occur.
**ADD EXPECTED EXPENSES**
You can add trip expenses including airfare, lodging, rental vehicle, and other anticipated expenses. A Travel Request is considered an estimate and the expense types available are at a high-level, users will have granular expenses in the trip’s expense report. At least one expense must be added to the request before it can be submitted.

1. Click **Add**, under the **Expected Expenses** section
2. Complete the required fields (red asterisk) per each expense type
3. Click **Save**
4. Repeat steps 1-3 until all expenses are added

**THIRD-PARTY COMPENSATORY TRAVEL**
When a third-party is paying for expenses on official, also known as Comp Travel, select the expenses that start with Comp Travel in the dropdown list. If expense amount unknown, enter “0”.

**ALLOCATE EXPENSES**
Each expense line of a Travel Request can be allocated to a specific Chartfield string.

1. Click the check box on the left to select the expense you wish to allocate
2. Click **Allocate**
3. Click **Add** on the **Allocation** screen
4. Enter the new Chartfield string and click **Save**
5. Allocate per percentage or amount in the **Allocation** window
6. Click **Save**
**Allocation for Multiple Expenses**

You may need to allocate multiple expenses to a different Chartfield string than the one entered on the Travel Request header. Follow the steps below to do so.

**Steps**

1. Click the check box on the left to select all expenses you would like to allocate
2. Click **Allocate**
3. Click **Add** on the Allocation screen
4. Enter the new Chartfield string and click **Save**
5. Allocate per percentage or amount in the Allocation window
6. Click **Save**

**Create a Favorite Allocation**

You can create favorite allocations per each UF GO profiled user. This can be useful when a traveler uses the same allocations on a regular basis.

- Click the **checkbox** on the left-hand side, once you’ve entered the new Chartfield string on the Allocation screen
- Click **Save as Favorite**
- Enter a descriptive **Favorite Name** to identify it
- Click **Save**

This favorite allocation is available until it is deleted by the user or delegate.

**Submit Request**

Once all expenses are entered, upon the submission of the Travel Request, the system may flag issues with the request. Red alerts will need to be cleared prior to submission while yellow are typically informational.

**Alerts**

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<td>Yellow alert</td>
<td>Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request.</td>
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STEPS

1. Click Submit Request
   - If a traveler clicks the button, the request enters the approval workflow
   - If a delegate clicks the button, the traveler is notified a request is ready for submission

2. Click Accept & Continue on the Domestic Travel Arrangement pop-up

The status of the request can be viewed on the Manage Requests page.

Use the Modify a Travel Request guide to adjust an existing request.

ATTACHMENTS

Documents can be attached to a Travel Request by clicking the Attachments link.

You will need to re-add the back-up documents to the appropriate expense line in an expense report.

FOR ADDITIONAL ASSISTANCE

Technical Issues
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352-392-HELP
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Travel Policies and Directives
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tavel@ufl.edu

PCard Policies & Questions
PCard Team
352-392-1331
pcard@ufl.edu
CREATE AND SUBMIT INTERNATIONAL TRAVEL REQUEST

The Request module is used to plan, organize, and request approvals for international official UF business travel. A Travel Request provides a general estimate or plan for your trip including anticipated costs to UF. An approved Request is required for all UF business travel including trips partially or wholly paid by a third party (even when self-funded).

NAVIGATION

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3. Enter UF gatorlink and password

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CREATE REQUEST

Tip! If you are a delegate preparing a request for a traveler, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

STEPS

1. Click Request and then click Create New Request
2. Select UFLOIR International Travel Request in the Request Type drop down
3. Complete required fields (red asterisk) and optional fields as needed. Click in the field to select an option or start typing.
A. **Request Name** – Provide a description of the trip that is recognizable to the traveler and approver and may be used as a searchable identifier later

B. **Trip Type** – Indicate if it is an in-state, out-of-state, or international trip

C. **Traveler Type** – Indicate if the traveler is an employee, a guest, emeritus, non-employee, UF GO associate

D. **Business Purpose** – Select reason for trip, if your choice is not listed select one that comes closest

E. **Benefit to Grant or University** – Describe how the expense directly benefits the funding source

F. **Business Travel Start/End Date** – Select date the trip begins and ends

G. **Final Destination Location** – Start typing the city name and select appropriate city and country. If your city is not listed, select the closest and contact the Travel Office to have the correct city added to the list

H. **Will this trip include personal travel?** – Select Yes or No

I. **Personal Travel Dates** – Complete this field if selected Yes on personal travel

**Note:** Click the Quick Help icon for additional information on what to enter in the associated field.

4. Complete the following required section

   - Are you taking UF property? – Select Yes or No
   - Are you visiting an Entity while abroad? – An entity is a university, government office, private business or anywhere going on official UF business. Entities will be specified through the Entity expense type
     - **Example:** Meeting two professors at the University of Australia. This question will be a Yes and University of Australia will be listed in the Expected Expenses section.
   - Is this trip partially or fully paid by a Third Party? – If any part of the trip will be paid by a third-party, select Yes

5. Complete Chartfield information. Click in the field to select an option or start typing and click on item to add
M. Business Unit – Select UFLOR or UFFND
N. Department – Select based on Department ID that is paying for the trip
O. Fund – Select appropriate 3-digit fund code and description (ex. 101, 102, 201, 211, etc.)
P. Program – Select appropriate program code based on the Chartfield string being used to cover the trip
Q. Budget Reference – Select Carry Forward or Current Budget
R. Source of Funds – Required for grant funds or transfers from component units
S. Flex – Optional, based on a department’s use to classify an expenditure at a more granular level
T. UFID – Optional, based on a department’s use to classify an expenditure at a more granular level
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V. CRIS Code – Only used by IFAS for federal reporting requirements
W. Comment – Optional, departments can enter additional information not already collected. Viewable by users, delegates, supervisors, and financial approvers

6. Click Create

Note: The system will save a draft if the Request Name and Start and End Dates fields are complete. All other fields can be completed later but before submission can occur.

ADD EXPECTED EXPENSES
You can add trip expenses including airfare, lodging, rental vehicle, and other anticipated expenses. A Travel Request is considered an estimate and the expense types available are at a high-level, users will have granular expenses in the trip’s expense report. At least one expense must be added to the request before it can be submitted.

1. Click Add, under the Expected Expenses section
2. Complete the required fields (red asterisk) per each expense type
3. Click Save
4. Repeat steps 1-3 until all expenses are added

THIRD-PARTY COMPENSATORY TRAVEL
When a third-party is paying for expenses on official, also known as Comp Travel, select the expenses that start with Comp Travel in the dropdown list. If expense amount unknown, enter “0”. 
ENTITY VISIT

An entity is a university, government office, private business or anywhere going on official UF business. If the answer for the question “Are You Visiting an Entity While Abroad?” is Yes, the expense Entity Visit must be added to the request.

- Example: A traveler is meeting two professors at the University of Australia. This question will be a Yes and University of Australia will be listed in the Entity Visit expense type.

1. List a detailed primary reason for the visit in the Reason for Visit field
2. Select or type the entity in the Foreign Institution/Entity field
   - If the entity being visited is not available, select “Other” and include name in the comment section
   - Include all locations you will visit during the entire trip
3. Select or type the country being visited in the Entity Country field
   - Include the country in the comment section if the entity being visited is not available

ALLOCATE EXPENSES

Each expense line of a Travel Request can be allocated to a specific Chartfield string.

1. Click the check box on the left to select the expense you wish to allocate
2. Click Allocate
3. Click Add on the Allocation screen
4. Enter the new Chartfield string and click Save
5. Allocate per percentage or amount in the **Allocation** window

![Allocation Window]

6. Click **Save**

**ALLOCATION FOR MULTIPLE EXPENSES**

You may need to allocate multiple expenses to a different Chartfield string than the one entered on the Travel Request header. Follow the steps below to do so.

**STEPS**

1. Click the check box on the left to select all expenses you would like to allocate
2. Click **Allocate**
3. Click **Add** on the Allocation screen
4. Enter the new Chartfield string and click **Save**
5. Allocate per percentage or amount in the **Allocation** window
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**CREATE A FAVORITE ALLOCATION**

You can create favorite allocations per each UF GO profiled user. This can be useful when a traveler uses the same allocations on a regular basis.

- Click the **checkbox** on the left-hand side, once you’ve entered the new Chartfield string on the **Allocation** screen
- Click **Save as Favorite**
- Enter a descriptive **Favorite Name** to identify it
- Click **Save**

This favorite allocation is available until it is deleted by the user or delegate.

**SUBMIT REQUEST**

Once all expenses are entered, upon the submission of the Travel Request, the system may flag issues with the request. Red alerts will need to be cleared prior to submission while yellow are typically informational.

**ALERTS**

| **Red alert:** Requires action, it indicates an item needs to be resolved before request can be submitted. Click on the alert to learn what needs to be fixed. |
| **Yellow alert:** Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request. |
1. Click **Submit Request**
   - If a traveler clicks the button, the request enters the approval workflow
   - If a delegate clicks the button, the traveler is notified a request is ready for submission

2. Click **Accept & Continue** on the **International Travel Attestation** pop-up

The status of the request can be viewed on the Manage Requests page.

Use the **Modify a Travel Request** guide to adjust an existing request.

**ATTACHMENTS**
Documents can be attached to a Travel Request by clicking the **Attachments** link.

You will need to re-add the back-up documents to the appropriate expense line in an expense report.

**FOR ADDITIONAL ASSISTANCE**

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VIEW STATUS OF A TRAVEL REQUEST

This guide provides instruction on how to review a Travel Request's status and step in the approval workflow.

NAVIGATION

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REVIEW STATUS OF TRAVEL REQUEST

**Tip!** If you are a delegate preparing a request for a traveler, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

1. Click on the Requests module
2. Locate the name of the travel request you are looking for

   The status is displayed at the top of the box with details at the bottom of the request box. Common statuses include:

   - **Top Header**
     - **Not Submitted**: The request has not been submitted into the approval workflow
     - **Submitted**: The request is submitted into the approval workflow
     - **Returned**: An approver returned the request for correction or editing, or the request was recalled by the Traveler or their Delegate for editing
     - **Approved**: The request has received all approvals

   - **Bottom Header**
     - **Pending External Validation**: The request is going through budget check and validation
     - **Approved**: The request has received all approvals
     - **Sent Back to User**: The request was returned by an approver for correction or editing
     - **Pending Cost Object Approval**: The request is pending financial approver (COA) departmental approval
     - **Submitted and Pending Approval**: The request is pending additional approval (i.e., Submitted & Pending Approval – RISC)
**IDENTIFY WHERE TRAVEL REQUEST IS IN APPROVAL WORKFLOW**

1. Click on the desired request
2. Click the Request Details dropdown menu and select Request Timeline
3. When done reviewing the progress of your request, select Close

**FOR ADDITIONAL ASSISTANCE**

**Technical Issues**
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

**Travel Policies and Directives**
Travel Office
352-392-1241
tavel@ufl.edu

**PCard Policies & Questions**
PCard Team
352-392-1331
pcard@ufl.edu
MODIFY A TRAVEL REQUEST

Follow the steps below to make modifications to an existing Travel Request such as change Chartfield string, add missing attachments, adjust business purpose, etc.

NAVIGATION

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- **ONE.UF**: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section
- **myUFL**: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO link
3. Enter UF gatorlink and password

**Note**: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

MODIFY TRAVEL REQUEST

**Tip!** If you are a delegate preparing a request for a traveler, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

1. Click on the Requests module
2. Click on the Travel Request name you wish to edit
   - A request must go through budget check (external validation) before the Recall button becomes available
   - If the travel request is in the approval workflow, click the Recall button
   - Click Yes to confirm recall
3. Make desired changes to Expected Expenses
   - Select the check box next to desired expense and select Edit
   - Make desired edits and click Save
4. Click Request Details and select Edit Request Header to update header fields such as business purpose, Chartfield string, trip dates, etc.
5. Click Save
6. Click **Copy** if you would like to update the listed fields edited in the expenses and allocations sections.  
   **Alert!** If you choose the **Do Not Copy** option, your changes will have to be made manually for each expense line item.

7. Click **Submit Request**

The Travel Request is submitted, the approval workflow process is initiated again.

---

**FOR ADDITIONAL ASSISTANCE**

**Technical Issues**  
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helpdesk.ufl.edu

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travel@ufl.edu

**PCard Policies & Questions**  
PCard Team  
352-392-1331  
pcard@ufl.edu
**ACT AS A DELEGATE**

A delegate is a user who is granted permission to act on behalf of another user to perform tasks, such as preparing a Travel Request, Expense Reports, and/or book a trip. While delegates can prepare transactions, they cannot submit on behalf of another user. For information on how a traveler or approver can designate a delegate, refer to the Manage Delegates guide.

**NAVIGATION**

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- ONE.UF: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section.
- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

**LOGGING IN**

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

**ACT AS A DELEGATE STEPS**

1. Click the Profile drop-down button in the upper right-hand corner of the dashboard
2. Select the A Delegate for another user who has granted you this permission option
3. Search for the person on whose behalf you want to act by entering their last name, UFID, or email address and selecting the appropriate user from the list
4. Click on the Switch button
   You are now acting as a delegate for the selected user and can prepare requests/reports, and/or book travel
5. Repeat as needed

**END DELEGATE SESSION**

1. Click the Profile button and then click the Switch button

   **Tip!** When accessing a user’s account as a delegate, verify that “Acting as” replaces “Profile” in the upper right-hand corner.
GUEST TRAVEL PROCESS

The Guest process at the University of Florida (UF) is composed of two steps. This is an overview for those using the POI Type 00016 Travel-Related for Guest Travel and General Reimbursement. Guest do not have access to the UF GO system. For POI 00017 and 00018, review the UF GO Associate/Emeritus Process guide.

1. Create a POI in myUFL
2. Enter a Guest Request/Expense Report in UF GO

DEFINITIONS

- **Guests:** In the UF GO system, guests are defined as individuals who are not UF employees and need to be reimbursed for travel or non-travel expenses
  - For example, job candidates, speakers, consultants, and non-employed students (graduate and undergraduate)
- **Person of Interest (POI) ePAF:** An HR electronic form that creates a record for a non-employee in the myUFL system
  - For UF GO, this ePAF create a UFID, departmental affiliation, and the connection to the UF GO system so an individual can get reimbursed

GUESTS IN UF GO

- To reimburse a non-employee for travel or non-travel expenses, this individual has to be added in the myUFL system through the POI process
- The POI process connects a non-employee in myUFL to the UF GO system
- Once the POI is in myUFL, an overnight file will transfer that information to UF GO and a Guest Request and/or Report can be created for this individual

---

**Unit enters POI ePAF in myUFL**

Select UF GO POI type

The POI process creates a UFID and departmental affiliation

**Overnight Process**

Enter POI prior to 4:00 pm to ensure it is available next day

**Guest available in UF GO to reimburse travel and non-travel expenses**

Select Guest Request/Report Type

Travel Guest Reports can include expenses made on behalf of the guest and reimbursements for the guest
1. **CREATE A POI ePAF IN MYUFL**

**Security Role:** UF_EPAF_POI_Coordinator will grant access to complete the POI process and it is restricted to the POI ePAF.

**Training:** To obtain the UF_EPAF_POI_Coordinator role, you will need to complete the following two courses:

- UF_PRV802_OLT  FERPA Basics
- UF_PRV804_OLT  Protecting Social Security Numbers & Identity Theft Prevention

**TIP!** HR professionals who have the UF_EPAF_DepartmentAdmin or the UF_EPAF_Level 1 Approver role (can enter hires, terminations, etc.) are able to complete this step without additional training.

**UF GO POI TYPES**

UF GO has different POI types that provide a distinct experience. It is essential that the correct POI type is selected when entering them in the system in order to obtain the desired end-result.

<table>
<thead>
<tr>
<th>POI Type</th>
<th>When to use it?</th>
<th>User Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>00016 – Travel Related</td>
<td>Use for travel or non-travel reimbursement for job candidates, speakers, consultants, and non-employed students (graduate and undergraduate)</td>
<td>No access to the UF GO system</td>
</tr>
<tr>
<td>00017 – UF GO Associate</td>
<td>Use for non-UF employees who need full access to the UF GO system. For example: TempForce workers, Shands employees who assist UF employees, County Extension, etc.</td>
<td>Can access the UF GO system like a UF profiled user</td>
</tr>
<tr>
<td>00018 – Emeritus User</td>
<td>Use for faculty who have received Emeritus status and will continue to be active travelers or PCardholders</td>
<td>Can access the UF GO system like a UF profiled user</td>
</tr>
</tbody>
</table>

**Steps**

1. In the UF GO system, verify the Guest is not already available as an active Guest Payee
2. Log in to my.ufl.edu
3. Navigate to ePAF Home Page:
   - NavBar > Main Menu > Human Resources > UF Departmental Administration > ePAF Home Page
4. Follow the process delineated on the [Creating a Person of Interest](#) instruction guide

**Key Information:**

- Social security is **NOT** a required field for a POI
- If an individual has an existing UFID, enter it on the UFID field and click **Search**
  - For active students or past affiliates, information will pull from Identity hub
- Guests will be paid via check, unless ACH information is entered as part of the POI process
- Existing non-employees may receive a request to complete the Gatorlink creation process, this is not required for UF GO and should be disregarded
  - This will only occur if the individual has an active UF affiliation
2. ENTER A GUEST TRAVEL REQUEST/EXPENSE REPORT IN UF GO

The intent of this section is to highlight the key differences between Travel Requests and Expense Reports for a UF GO profiled user and a guest. Once the Guest Traveler has been entered in myUFL, the UFID and name will be available to create a Travel Request, Travel Expense Report, and/or General Reimbursement.

The Guest will not have access to the UF GO system, and the Request or Expense Report must be created by a UF GO Profiled User.

**TRAVEL REQUEST**

**NAVIGATION**

Access UF GO via **ONE.UF** and **myUFL**

- **ONE.UF**: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section
- **myUFL**: my.ufl.edu > My Self Service > UF GO Travel and PCard

**LOGGING IN**

1. Enter gatorlink@ufl.edu and click **Next**
2. Click **Sign in with University of Florida SSO**
3. Enter **UF gatorlink** and **password**

   **Note**: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

**STEPS**

1. Click **Request** > Click **Create New Request**

2. Select one of the available **Guest Request** types
   - UFLOR Domestic Travel Request (Guest)
   - UFLOR International Travel Request (Guest)

3. Enter the **UFID** or **Name** of the **Guest Traveler** field
   - Verify that the filter next to the field is set to **Either**

4. Complete the remaining of the Travel Requests fields using the **Create and Submit Travel Requests** instruction guide.
CREATE A GUEST EXPENSE REPORT

There are two types of expense reports that may be entered for a Guest:

- UFLOTR Travel Report (Guest)
- UFLOTR General Reimbursement – Guest (Non-Travel)

**STEPS**

1. Click Expense > Click Create New Report

2. Select one of the available Guest Report types

3. Enter the UFID or Name of the Guest Payee field
   - Verify that the filter next to the field is set to Either
   - Selecting a payee ensures any reimbursement, whether travel or non-travel related is sent to the appropriate person

4. Complete the remaining of the Expense Reports fields (travel or non-travel) using the appropriate instruction guide
   - Create and Submit a Travel Expense Report
   - A Travel Report (Guest) can include the reimbursement for the Guest traveler and the expenses paid by a UF GO Profiled User’s PCard
   - Create and Submit a Report for General Reimbursement

BOOKING A TRIP FOR A GUEST

The Travel module of UF GO allows for booking on behalf of guests.

**STEPS**

1. Click Travel > Click Book for a guest

2. Enter the trip information
   - You can book airfare, car rental, hotel, and rail
   - You will be able to enter the guest’s information at the end of the reservation

3. For assistance in completing a booking, please refer to the Booking Travel in UF GO instruction guide.

FOR ADDITIONAL ASSISTANCE

**Technical Issues**
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

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352-392-1241
tavel@ufl.edu

**PCard Policies & Questions**
PCard Team
352-392-1331
pcard@ufl.edu
BOOKING TRAVEL
TRAVEL DASHBOARD

1. **Black Menu Bar**: Select Travel to access the booking tool

2. **White Menu Bar**
   - **Travel** can be used to navigate to the main Travel module
   - **Arrangers** view used to arrange travel as a travel arranger
   - **Trip Library** to view upcoming trips and bookings
   - **Trip Templates** can be used to set up frequent trip templates
   - **Tools** useful travel tools including airport guides and government travel warnings

3. **Booking tool** to make reservations for airfare, car rental, hotel, and train

4. **Travel Alerts** (if any) that every UF traveler should be aware

5. **Blue Tabs**
   - **Company Notes** contain UF specific information
   - **Upcoming Trips** for current travel bookings
   - **Trips Awaiting Approval** for trips pending approval
   - **Remove Trips** for completed trips that need a Report
BOOKING TRAVEL IN UF GO

The Travel module allows UF GO profiled users to book for themselves and others.

NAVIGATION

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- ONE.UF: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section.
- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

START BOOKING

Click on the Travel module to start booking Flight/Train, Car, Hotel, or Train.

MAKE FLIGHT RESERVATION

STEPS

1. On the Flight/Train tab, select one of the following:
   - Round Trip
   - One Way
   - Multi City
2. In the From and To fields, enter the cities for your travel
3. In the Depart and Return fields, select the appropriate dates and times
4. Click Search
5. Click View Fares next to the preferred itinerary to view available booking options
6. Click desired blue fare button
7. A pop-up with fare information and a listing of reservation options may appear for your review
8. Click OK

Key Information:

- If you don’t see the flight you want, expand the +/- 8 hours to the max of 12 for additional options
- Use the tabs to view flights by price or by schedule. Searching by schedule allows you to choose different airlines for the departing and return flights
- If you know the flight number you are looking for, use the search box provided
- Use the matrix at the top of the search results to select the number of stops or airlines
• You can save a PDF copy before you reserve if you have personal time included in your trip and you need a cost comparison

9. Click Select a Seat links in the Select Seats section to select your seat for departure and returning flights
10. Click Reserve Flight and Continue

**Note:** The system reserved the flight and the Travel Details page appears noting that the flight has been secured.

11. Click Next
12. Select form of payment
13. Click Purchase Ticket to confirm the itinerary

The Finished! page will appear stating that you have successfully booked your car rental along with a trip record locator number.

**Note:** You can add car and hotel once you’ve completed the airfare segment of the reservation.

---

**MAKE CAR RENTAL RESERVATION**
Follow the steps below to reserve a car.

**STEPS**

1. Click on the Car Rental tab
2. Select the Pick-up date
3. Select the Drop-off date
4. Select Pick-up location
   - If Airport is selected, enter the airport code or city to locate
   - If Off-Airport is selected, click Search to trigger a pop-up to identify the location based on reference point or zip code
5. Select the desired car option
6. Click on car rental price blue button
7. Review summary of the car reservation
8. Click Reserve Car and Continue
9. Click Next
10. Enter a Trip Name, Trip Description, and the Travel Request ID associated with the travel
11. Click Next
12. Click Confirm Booking

The Finished! page will appear stating that you have successfully booked your car rental along with a trip record locator number.
MAKE HOTEL RESERVATION

**STEPS**

1. Click on the Hotel tab
2. Enter Check-in Date
3. Enter Check-out Date
4. Enter search mile criteria
5. Select reference point options
   - Airport
   - Address
   - Company location
   - Reference Point / Zip Code
6. Use the filter options to narrow your search by Price Range, Property Brand, or Amenities
7. Click View Rooms next to the preferred hotel to view available booking options
8. Click desired room rate fee blue button and review reservation policies for the hotel
9. Select the Payment Method
10. Review the hotel rate rules and cancelation policy
11. Click the checkbox to agree
12. Click Reserve Hotel and Continue
13. Click Next
14. Enter a Trip Name, Trip Description, and the Travel Type associated with the travel
15. Click Next
16. Click Confirm Booking

The Finished! page will appear stating that you have successfully booked your car rental along with a trip record locator number.

MAKE A TRAIN RESERVATION

**STEPS**

1. On the Train tab, select one of the following:
   a. Round Trip
   b. One Way
   c. Multi City
2. In the From and To fields, enter the cities or train stations for your travel
3. In the Depart and Return fields, select the appropriate dates and times
4. Click Search
5. Click View Fares next to the preferred itinerary to view available booking options
6. Click desired blue fare button
7. Select Payment Method
8. Click Reserve Train and Continue
9. Click Next
10. Enter a Trip Name, Trip Description, and the Travel Type associated with the travel
11. Click Next
12. Click Confirm Booking to confirm the reservation

The Finished! page will appear stating that you have successfully booked your car rental along with a trip record locator number.

CANCEL RESERVATIONS
Flight changes may be available for travelers that include a single carrier. If the trip is already ticketed but has not occurred, you can change the time or date of the flight. Your change options will be within the same airline and routing.

STEPS
1. To cancel your entire trip, follow these steps:
   a. Click the Travel module on the UF GO homepage
   b. Click the Upcoming Trip tab
   c. Click the Cancel Trip link next to the trip you want to cancel
   d. Click Ok on the pop-up message

The trip is now cancelled.

Note: If you are unable to change or cancel your reservation, contact a World Travel agent for assistance at (865) 288-1901.

FOR ADDITIONAL ASSISTANCE

<table>
<thead>
<tr>
<th>Technical Issues</th>
<th>Travel Policies and Directives</th>
<th>PCard Policies &amp; Questions</th>
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<tbody>
<tr>
<td>The UF Computing Help Desk 352-392-HELP helpdesk.ufl.edu</td>
<td>Travel Office 352-392-1241 <a href="mailto:travel@ufl.edu">travel@ufl.edu</a></td>
<td>PCard Team 352-392-1331 <a href="mailto:pcard@ufl.edu">pcard@ufl.edu</a></td>
</tr>
</tbody>
</table>
World Travel Service is a travel agency contracted by UF to support our travelers with airfare, rental car and hotel reservations made through the UF GO booking tool or directly with their agents.

Our dedicated WTS team has agents available Monday – from 8 a.m. to 5 p.m. WTS also has agents available 24/7 to assist travelers during our team’s off-hours; please use code A-1RP8 when calling.

- University of Florida Local: (865) 288-1901
- University of Florida Toll Free: (800) 801-6201
- Email: BlueTeam@worldtrav.com
  
  **NOTE:** Emails are worked during the business hours of 8:00 am - 5:00 pm. Turnaround time for emails can be up to 4 hours as phones take first precedence.
- Website: [Home - World Travel Service](#)

The Traveler will need to have a profile in UF GO before calling WTS. If the traveler does not have a profile cannot make the reservations unless they provide a credit card to purchase the ticket. An employee from UF can call in to make reservations for a non-employee of UF but they (the guest/non-employee) must have a profile in Concur.

The required fields in your Profile that are mandatory:

- UF ID
- Traveler Type (Employee, Guest, Other)

**Note:** If a traveler or admin books travel via UF GO they will be prompted to answer the required reportable fields.

---

**FOR ADDITIONAL ASSISTANCE**

**Technical Issues**
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

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travel@ufl.edu

**PCard Policies & Questions**
PCard Team
352-392-1331
pcard@ufl.edu
MODIFY OR CANCEL A TRIP

Modify

Making some booking modifications (e.g. adding a segment) is dependent on the Request’s approval status.

If Request is not approved:

1. Recall the Request
2. Make the necessary changes to Expected Expenses
3. Resubmit for approval
4. Book from the modified Request once approved

If Request is approved:

1. Do not Recall the Request as this could affect bookings made in UF GO; instead, contact WTS (World Travel Service) to make the necessary changes to the booking
2. It is not necessary to submit a new Request; instead, changes are reflected on the Report

Cancel

Bookings established through UF GO are cancelled in UF GO. Cancellations may result in fees or penalties. Whether or not those fees and penalties are considered a “reimbursable expense” is dependent on UF Travel Directives.

1. Select Trip Library in the Travel module to view upcoming trips
2. Click the “Cancel Trip” link in the Action column for the trip

3. A popup notification with a warning appears: Read the warning carefully, paying special attention to notifications regarding lodging
   a. If the trip is cancelled on the day the trip is scheduled to commence, the user must contact the hotel directly to cancel
   b. If any portion of the trip was booked outside of UF GO or WTS (World Travel Service) (e.g. lodging or car rental), that portion is cancelled directly through the vendor, not UF GO
4. Click “OK” to confirm trip cancellation; the user can add comments for reporting purposes (not required)
5. DO NOT add comments in “Comments for the Travel Agent” as that results in an agency fee; instead, click “Send this trip to a travel agent to cancel” to complete cancellation

6. If cancelled during the free cancellation period, the charge (if present) is voided and no longer in Available Expenses
7. If cancelled outside the free cancellation period, associated cancellation expenses are added to Available Expenses
COST COMPARISON

Complete a cost comparison when including personal travel in conjunction with official UF business travel.

STEPS

1. Enter travel dates of the official business event adding the one day prior/after for domestic, and two days prior/after for international.
2. Select the airfare that best matches the travel times you are using for your trip
3. Click on Print on your web browser
4. Select Save to PDF
5. Click Save
6. Add to your Travel Request documents as an attachment

WHEN BOOKING OVER THE PHONE WITH WORLD TRAVEL
Ask the travel agent to provide a cost comparison to be emailed to you.

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
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pcard@ufl.edu
EXPENSES
CREATE AND SUBMIT TRAVEL EXPENSE REPORT

Travel expense reports are necessary to reimburse travelers for out-of-pocket expenses incurred during travel and to settle PCard transactions made in support of an official UF business trip.

- UF GO requires an approved travel request to be attached to each expense report.
- Expense reports can be created by a delegate but can only be submitted by the traveler.
- A traveler may have a travel expense report that contains both out-of-pocket and PCard charges for their trip.
- Trip expenses paid by a Third party (comp travel) are not entered in an expense report. Information regarding the trip can be added via the Manage Receipts link.

NAVIGATION

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

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- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

CREATE EXPENSE REPORT

Tip! If you are a delegate preparing a request for a traveler, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

STEPS

1. Open the Travel Request for the trip and click Create Expense Report from an approved travel request
2. Under Report Details, select the Report Header option from dropdown menu to verify the travel dates and funding details are accurate
   - Expense reports on C&G funds 201 and 209 will need to have the following fields:
     - Travel Start Time: time leave official headquarters or your home
     - Travel End Time: time return to official headquarters or your home
     - Official Headquarters: the city or town nearest to the area where most of the employee’s work is performed
3. Make changes to the Report Header as needed
   - You can edit header fields including Chartfield information
4. Select Save
5. Select Update if a confirmation box appears. You are confirming for UF GO to automatically update the listed fields in the expenses, itemizations, and allocations sections.

Alert! If Update is not selected, the changes listed on the pop-up will need to be changed manually on each expense line.

**ENTER EXPENSES DETAILS IN REPORT**

If a user creates a travel expense from an approved travel request, the expenses listed on the travel request will be pulled into the expense report. Each expense needs to be verified and additional details entered.

**Note:** Prior to verifying expenses, upload your receipts. Refer to the Managing Receipts guide for more information.

**STEPS**

1. Select an existing expense and click Edit
2. Enter information on required fields (red asterisk)
   - Depending on the expense type you will see different fields.
   - For expenses such as airfare or lodging, the user is defaulted as an attendee.
In the screenshot below you can see the Airfare expense type.

3. Add receipts to an expense line by clicking on the Add Receipts button
4. Continue to click the Add button until you’ve added all desired receipts
5. Click the Save Expense button

6. Click on the Add Expense button to add new expenses that occurred during the trip
7. Select the applicable Expense type

**PCARD CHARGES ON A TRAVEL EXPENSE REPORT**

In UF GO, travel related PCard transactions are reconciled in a travel expense report. The PCard charge is loaded into the system, and it is available in the PCardholder’s UF GO profile. You will need to merge the estimated expense line created in the travel request with the actual PCard charge.

**MERGING EXPENSE LINES**

1. Select the expense lines you wish to merge by clicking on the check box on the left-hand side
2. Click the Combine Expense button to merge two expense line items
Tips for Entering Expense Details

- **Entertainment Expense**: Add attendees via the Attendees link.
- **Per Diem/Meal Adjustment**: Use this expense type to reduce reimbursement to the traveler if money from a cash advance is owed to the university. Enter the minus sign ahead of the dollar amount and it will be subtracted from the reimbursable amount. Ex. -12.00
- **Lodging Type**: If a hotel vendor is not listed in the dropdown menu, enter the name in the field (e.g., Hut #3)
- **Lodging**:  
  - If sharing a room, add occupants via Attendees link
  - If the expense report is for an international trip, check box for Travel Allowance (this will compare lodging expense to the GSA lodging rates per destination) and you will need to create a travel allowance
- **Traveler’s myUFL TA/UF GO Request ID**: This field is used to reference a TA entered MyUFL when adding new expense details, or a UF GO Request ID when reconciling an expense paid on behalf of another UF GO user

### Allocate Expenses

You can split the expenses to different funding sources if needed. Refer to the Allocate Expenses to More than One Chartfield guide. If all expenses will be charged to the ChartField string in the Report Header, then no additional action is needed.

### Travel Allowance

This step is required only for international trips, please refer to the Create Travel Allowance guide for more information.

### Missing Receipts

If a traveler is missing a receipt, follow the Missing Receipt Declaration instruction guide to account for it.

### Submit Report

**Reminder!** If you are a delegate and prepared this report on behalf of another user, once you click Submit, they will receive an overnight notification to log into UF GO to review and submit the travel expense report.

Once all expenses are entered, upon the submission of the Travel Request, the system may flag issues with the request. Red alerts will need to be cleared prior to submission while yellow are typically informational.

### Alerts

<table>
<thead>
<tr>
<th>Alert</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red alert</td>
<td>Requires action, it indicates an item needs to be resolved before request can be submitted. Click on the alert to learn what needs to be fixed.</td>
</tr>
<tr>
<td>Yellow alert</td>
<td>Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request.</td>
</tr>
</tbody>
</table>
STEPS

1. Click Submit Report
2. Click Accept & Continue after reading the electronic agreement
3. On the confirmation screen, click Submit Report
4. Review the expense report status and click Close

Report is submitted and the approval workflow process initiated. The status of the report can be viewed on the Manage Expenses page.

RECALL

If an expense report needs to be modified after it has been submitted into approval workflow, the Recall button allows for a user to pull it from workflow.

The Recall button becomes available once the external validation step is complete as part of the approval workflow.

FOR ADDITIONAL ASSISTANCE

<table>
<thead>
<tr>
<th>Technical Issues</th>
<th>Travel Policies and Directives</th>
<th>PCard Policies &amp; Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>The UF Computing Help Desk</td>
<td>Travel Office</td>
<td>PCard Team</td>
</tr>
<tr>
<td>352-392-HELP</td>
<td>352-392-1241</td>
<td>352-392-1331</td>
</tr>
<tr>
<td>helpdesk.ufl.edu</td>
<td><a href="mailto:travel@ufl.edu">travel@ufl.edu</a></td>
<td><a href="mailto:pcard@ufl.edu">pcard@ufl.edu</a></td>
</tr>
</tbody>
</table>
CREATE AND SUBMIT A PCard ONLY (NON-TRAVEL) EXPENSE REPORT

A PCard holder must complete an expense report for all PCard transactions. For example, commodities, subscriptions, fees, etc. Each user will see their PCard charges in their UF GO profile. When a PCardholder uses their card, the PCard transactions is processed by the merchant and then the bank. Once that occurs, the charge will then appear in UF GO.

- A PCard expense report can be composed of different expense types
- Each expense line can be allocated to a different Chartfield string
- Reconciliation can occur every day, best practice is for submission of the report to be every 7 to 14 days

NAVIGATION

Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- ONE.UF: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section.
- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN

1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

CREATE EXPENSE REPORT

Tip! If you are a delegate preparing a report for a PCardholder, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

STEPS

1. Click the Expense module
2. Click Create New Report
3. Select the Report Type UFLOR PCard Only (Non-Travel)
4. Enter a Report Description
   - Provide a description that will be easily recognizable to the PCard holder and approver. For example: “Purchases for the Week of XXX”.
5. Complete relevant Chartfield information (red asterisk are required)
6. Click the Create Report button

Note: Prior to entering expenses, upload your receipts. Refer to the Managing Receipts guide for more information.
**ADDING TRANSACTIONS TO AN EXPENSE REPORT**

1. Click **Add Expense**
2. Select **Create New Expense** OR **Available Expenses** tab

**CREATE NEW EXPENSE**

   a. Click **Add Expense**
   b. Select the **Create New Expense** Tab
   c. Enter or Select **Expense Type**
   d. Complete required fields

OR

**ADD AVAILABLE EXPENSES**

   a. Click **Add Expense**
   b. Select **Available Expenses** tab
   c. Click the **check box** of the UFLOR PCard charge in **Available Expenses** to add to the expense report
   d. Select the appropriate expense type if incorrect one is displayed
      - Undefined charges will need to be changed to an option from the drop-down menu
   e. Complete required fields

3. Click **Add To Report/Add to Expense**

The selected expense(s) will now appear in the expense report.

**ALLOCATE EXPENSES**

You can split expenses to different funding sources. Refer to the [Allocate Expenses to More than One Chartfield guide](#).

If all expenses will be charged to the ChartField string in the Report Header, no additional action is needed.

**MISSING RECEIPTS**

If a user is missing a receipt, follow the [Missing Receipt Declaration instruction guide](#) to account for it.

**SUBMIT REPORT**

**Reminder!** If you are a delegate and prepared this report on behalf of another user, once you click **Submit**, they will receive an overnight notification to log into UF GO to review and submit the travel expense report.

Once all expenses are entered, upon the submission of the expense report, the system may flag issues. Red alerts will need to be cleared prior to submission while yellow are typically informational.
ALERTS

| Red alert: Requires action, it indicates an item needs to be resolved before request can be submitted. Click on the alert to learn what needs to be fixed. |
| Yellow alert: Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request. |

STEPS

1. Click Submit Report
2. Review the User Electronic Agreement and click Accept & Continue
3. Review the Report Totals pop-up
4. Click Submit Report

The report is submitted and the approval workflow process initiated. The status of the report can be viewed on the Manage Expenses page.

RECALL
If an expense report needs to be modified after it has been submitted into approval workflow, the Recall button allows for a user to pull it from workflow.

The Recall button becomes available once the external validation step is complete as part of the approval workflow.

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives
Travel Office
352-392-1241
tavel@ufl.edu

PCard Policies & Questions
PCard Team
352-392-1331
pcard@ufl.edu
Managing Travel Expense Reports When You Book Travel on Your PCard for Other Employees

The PCard Holder
Hayden works in Shared Services. They assist employees with booking travel related expenses. Rory, a faculty member, submitted a Travel Request to attend a conference in Chicago. Hayden used their PCard to pay the conference registration fee and book the hotel for Rory. It is time for Hayden to reconcile PCard charges and submit the appropriate Expense Report.

1. They log into UF GO and see the PCard expenses under available expenses.
2. Create a Travel Expense Report under the Expense Tab.
3. Reference Rory’s Travel Request ID on the itemized expense line and add Rory as the attendee.

What if I Book for Multiple Travelers?
Sometimes multiple traveler’s PCard expenses will be available under your available expenses. In this case, all expenses can be submitted in one Travel Expense Report. It is a best practice to submit reports biweekly.

Since there is not a 1-1 relationship to a travel in the Travel Report Header:

1. Set the Business Travel Start and End Date to reflect the frequency in which you are submitting the report.
2. Set the Business Purpose field to Other Purpose.
3. Include a comment stating that report combines multiple traveler expenses.
4. Add travel related available expenses.
5. Reference the Traveler’s Request ID and add Traveler as attendee on itemized line.

The Traveler
While Rory is in Chicago, they may incur additional expenses. When Rory returns from the conference, they will:

1. Create a Travel Expense Report from an Approved Travel Request.
2. Add expenses they personally incurred.
3. Submit the report.

For additional assistance complete the PCard and Travel Support Form and a team member will reach out to you.
EXPENSING A TRAVEL PURCHASE ON BEHALF OF A TRAVELER

At UF, a department or unit may need to make travel purchases on behalf of traveler who does not have a University form of payment. For example, a department member is attending a conference and the office manager purchases the conference registration on his PCard. Note: It is best practice for all frequent travelers to have their own PCard.

Step 1: Create a Travel Request for the traveler

<table>
<thead>
<tr>
<th>Travel Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Airfare</td>
</tr>
<tr>
<td>• Hotel</td>
</tr>
<tr>
<td>• Conf. Registration</td>
</tr>
<tr>
<td>• Meals</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Important!
Include all estimates of the trip regardless of payment form

Instruction Guides:
• [Create and Submit a Domestic Travel Request](#)
• [Create and Submit an International Travel Request](#)

Step 2. Create a Travel Expense Report for the Traveler

<table>
<thead>
<tr>
<th>Travel Expense Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Airfare</td>
</tr>
<tr>
<td>• Hotel</td>
</tr>
<tr>
<td>• Conf. Registration</td>
</tr>
<tr>
<td>• Meals</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Important!
While all expense lines from the traveler’s Request will copy to the expense report, the conference line will need to be removed since it was paid for by someone else.

Instruction Guide:
• [Create and Submit a Travel Expense Report](#)

Step 3. Create a Travel Expense Report for the PCardholder

<table>
<thead>
<tr>
<th>Travel Expense Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Conf. Registration</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Important!
A Travel Expense Report is created by the PCard holder to reconcile the conference PCard charge.

Note: The Traveler’s Request Number must be included in the Traveler’s myUFL TA/UF GO Request ID field

Instruction Guide:
• [Create and Submit a Travel Expense Report](#)
Best Practice: Naming Convention

To help Financial Approvers have a more holistic view of a trip that is being paid in two reports, consider using the naming convention listed below.

Example:

1. Travel Request: Smith - NACUBO Conference
2. Traveler’s Expense Report: Smith - NACUBO Conference (1 of 2)
3. PCard holder Expense Report: Smith - NACUBO Conference (2 of 2)

Important: Enter the Request ID in the PCardholder’s expense report to reference the Travel Request.

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives
Travel Office
352-392-1241
travel@ufl.edu

PCard Policies & Questions
PCard Team
352-392-1331
pcard@ufl.edu
CREATE AND SUBMIT A GENERAL REIMBURSEMENT EXPENSE REPORT

The General Reimbursement expense report is to reimburse for expenses personally paid by UF employees or other individuals conducting official UF business. These reimbursements should be used for small, “out-of-pocket” purchases only when the University’s preferred purchasing methods cannot be utilized.

To reimburse for travel expenses, refer to the Create and Submit a Travel Expense Report guide.

NAVIGATION
Access UF GO via ONE.UF and myUFL

- ONE.UF: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section
- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN
1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

CREATE GENERAL REIMBURSEMENT EXPENSE REPORT

Tip! If you are a delegate preparing a report for a user, you must first act on their behalf in UF GO. Refer to the Act as a Delegate User.

STEPS
1. Click the Expense module
2. Click Create New Report
3. Select the Report Type UFLOR General Reimbursement (Non-Travel)
4. Enter a Report Name/Description
   - Provide a description that will be easily recognizable to the user and approver. For example: “Student Clinic Purchases”.
5. Complete required Chartfield information (red asterisk are required)
6. Click the Create Report button

Note: Prior to entering expenses, upload your receipts. Refer to the Managing Receipts guide for more information.
ADDING TRANSACTIONS TO AN EXPENSE REPORT

1. Click Add Expense
2. Select Create New Expense tab OR Available Expenses tab

CREATE NEW EXPENSE

a. Click Add Expense
b. Select the Create New Expense Tab
c. Enter or Select Expense Type
d. Complete required fields

OR

ADD AVAILABLE EXPENSES

a. Click Add Expense
b. Select Available Expenses tab
c. Select desired available expense
d. Complete required fields

3. Click Add to Report/Save Expense

The selected expense(s) will now appear in the list of expenses in the expense report.

4. Click on the expense line to review the details
   o Select the appropriate expense type if incorrect is displayed
   o Undefined charges will need to be changed to an option from the drop-down menu
5. Complete any additional required fields indicated by a red asterisk (*)
6. Click Save Expense

ALLOCATE EXPENSES

You can split expenses to different funding sources. Refer to the Allocate Expenses to More than One Chartfield guide. If all expenses will be charged to the ChartField string in the Report Header, no additional action is needed.

MISSING RECEIPTS

If a user is missing a receipt, follow the Missing Receipt Declaration instruction guide to account for it.

SUBMIT REPORT

Reminder! If you are a delegate and prepared this report on behalf of another user, once you click Submit, they will receive an overnight notification to log into UF GO to review and submit the travel expense report.

Once all expenses are entered, upon the submission of the expense report, the system may flag issues. Red alerts will need to be cleared prior to submission while yellow are typically informational.
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**STEPS**

1. Click **Submit Report**
2. Review the User Electronic Agreement and click **Accept & Continue**
3. Review the Report Totals pop-up
4. Click **Submit Report**

Report is submitted and the approval workflow process initiated. The status of the report can be viewed on the **Manage Expenses** page.

**RECALL**

If an expense report needs to be modified after it has been submitted into approval workflow, the **Recall** button allows for a user to pull it from workflow.

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RESOURCES
College of Medicine Tips and FAQ
UF GO Travel and Pcard

Tips

- **UF GO Questions**
  Submit questions to UF GO Team using the Salesforce Form [PCard and Travel Support](https://tfaforms.net)

Quick Tidbits

- **Is virtual meeting considered travel, therefore, need a Travel Request?**
  If no travel is involved, it should go on a Pcard only report with the ‘Meeting/Training Expense’ expense type (which routes to account code 715100). No Travel Request would be needed in this instance.

- **Honorariums & Guest Travel in UF GO**
  Honorariums should be paid through the Marketplace for tax implications, please find more information at the website below:
  [Honoraria – Finance & Accounting](http://ufl.edu)
  The travel for an honorarium or guest speaker should be processed through UFGO and should be added as a 00016 guest so all users will have access to process travel and the guest will not have to access UFGO for reimbursement submittal. If needed, flights, rental car and lodging will be booked through the UFGO booking tool. Please reference prior instructions on Guest Travel.

- **Closing a Travel Request**
  Once a trip is complete, if there is any remaining money, please act as a delegate for the traveler and open the Travel Request for the trip. Within this request you will see a box that says Report 1: $ (Amount) Remaining: $ (Amount). There is an orange box that says close. This will unencumbered your funding used for the request and will remove the request from the dashboard.
Business Purpose & Benefit to the Grant or University/Description of Travel

Business Purpose
A concise statement providing the level of detail needed for an independent party to easily and quickly disseminate the legitimate reason for the transaction and its benefits to the University of Florida.

<table>
<thead>
<tr>
<th>Business Purpose</th>
<th>Benefit to Grant or University/Description of Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission Recruiting</td>
<td>Achieve grant requirements</td>
</tr>
<tr>
<td>Agency Field Management</td>
<td>Aids in medical teaching</td>
</tr>
<tr>
<td>Audit</td>
<td>Benefits the UF mission with better relationships</td>
</tr>
<tr>
<td>Client Visits or Site Visits</td>
<td>Build national reputation at the University of F</td>
</tr>
<tr>
<td>Complementary Travel</td>
<td>Continuing medical education</td>
</tr>
<tr>
<td>Conference or Convention</td>
<td>Disseminate UF/IFAS research to the industry</td>
</tr>
<tr>
<td>Consultant or Contractual Service</td>
<td>Educational enhancement</td>
</tr>
<tr>
<td>Faculty Recruitment</td>
<td>Enhance medical awareness</td>
</tr>
<tr>
<td>Generic Employee Reimbursement</td>
<td>Enhance research and extension programs</td>
</tr>
<tr>
<td>Grant Review</td>
<td>Enhance stakeholder relations</td>
</tr>
<tr>
<td>Inspections</td>
<td>Enhance teaching abilities</td>
</tr>
<tr>
<td>Interview</td>
<td>Enhance nutrition education for Florida citizens</td>
</tr>
<tr>
<td>Investigations</td>
<td>Enhancement of the goals and missions of the UF</td>
</tr>
<tr>
<td>Legal Services</td>
<td>Enhances teaching, research and extension programs</td>
</tr>
<tr>
<td></td>
<td>Enhances the quality of the programs for the libr</td>
</tr>
<tr>
<td></td>
<td>For departmental operations</td>
</tr>
<tr>
<td></td>
<td>Hiring of quality personnel</td>
</tr>
<tr>
<td></td>
<td>Improve health care training</td>
</tr>
<tr>
<td></td>
<td>Improve patient care</td>
</tr>
<tr>
<td></td>
<td>Improve the visibility of UF in this field</td>
</tr>
</tbody>
</table>

Meeting
Miscellaneous
Professional Development
Recruitment
Speaker at Conference or Convention
Speaker or Guest Speaker
Study Abroad Program
Testing
Tournament
Training
Transporting Others
Transporting Records
Workshops
Marketing
Information obtained helps with ongoing research
Knowledge gained and contacts made will benefit FPU
Knowledge gained and contacts made will benefit UF
Knowledge gained will be used as an education tool
Network with other communication specialists building knowledge
Promote the efforts of development
Promote UF as a leader in the education field
Promote UF as a leading research institution
Research collaborations
Research goal of the grant
To promote academic excellence
UF/IFAS industry education
Visibility as a leading institution in this area
CREATE A TRAVEL ALLOWANCE FOR INTERNATIONAL TRIPS

Travel Allowance is required only for international trips.

The Travel Allowance defines the traveler’s time in travel status, applies the MI&E allowance to their expense report, and determines the allowable rate. This step is required for all international trips with lodging and/or meal expenses.

The allowable rate for the first day of travel is based on the U.S. Department of State, Office of Allowances listed rate for the city where the traveler lodged for international travel. The allowance for the last day is based on the rate for the last city the traveler lodged.

Alert! The Travel Allowance is not automatically prompted when the user creates a report.

CREATING A TRAVEL ALLOWANCE ITINERARY IN EXPENSE REPORT DETAILS

NAVIGATION
Access UF GO via ONE.UF, myUFL, or the SAP Concur mobile app

- ONE.UF: Log in to https://one.ufl.edu > Select UF GO under the Faculty/Staff section.
- myUFL: my.ufl.edu > My Self Service > UF GO Travel and PCard

LOGGING IN
1. Enter gatorlink@ufl.edu and click Next
2. Click Sign in with University of Florida SSO
3. Enter UF gatorlink and password

CREATE A TRAVEL ALLOWANCE

Review the Create and Submit a Travel Expense Report instruction guide for detailed steps.

STEPS
1. Click on Create New Report on the Expense module
2. Complete the required fields (red asterisk) in the report header
3. Click on Next
4. Click Travel Allowance
5. Select Manage Travel Allowance
   o The Travel Allowances for Report screen will open

TRAVEL ALLOWANCES FOR REPORT
If an expense report has an available itinerary from the UF GO booking tool, information will flow to the travel allowance screen. If the itinerary is not available, a new itinerary can be manually created.
CREATE NEW ITINERARY

1. Click Create New Itinerary
2. Add your departure and arrival details
3. Click Save
4. Click Next once you added your departure and return dates
5. Review the itinerary information entered

6. Click Next

7. Click the check boxes for the meals or days you need to exclude from your per diem request. You can select individual meals or check a box at the left side of the screen to exclude the entire day.

For example, meals could be excluded because:

- Meals were provided at no cost to you
- Meals were claimed as part of another expense: conference fee, group meal, business dinner, etc.
- Personal travel days

The allowance will be reduced as you check boxes. The rates for the first and last days of travel are automatically adjusted to 75%.
8. Click Create Expense to complete the travel allowance
9. Verify the meals on your expense report details screen

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Expense Type</th>
<th>Vendor Details</th>
<th>Date</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Funds</td>
<td>Travel Meals - International</td>
<td>Rome, ITALY</td>
<td>04/25/2023</td>
<td>$77.00</td>
</tr>
<tr>
<td>Personal Funds</td>
<td>Travel Meals - International</td>
<td>Rome, ITALY</td>
<td>04/24/2023</td>
<td>$98.00</td>
</tr>
</tbody>
</table>

10. Click Submit Report once you entered all expenses

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
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