SPEND AUTHORIZATION QUICK REFERENCE GUIDE

REQUIRED ACADEMIC DAY TRIPS ONGOING THROUGHOUT THE SEMESTER

One single Spend Authorization can be submitted for Required Academic Day trips that are ongoing throughout the semester. The purpose of this type of Spend Authorization is primarily for the rental fleet vehicle to be used for the required course travel throughout the semester, to provide a list of students that will be participating in the travel, to gather the itinerary for times on the road, and to collect emergency contact information for the Trip Manager and the Emergency First Responder.

CRITERIA:
- Must be required academic day travel
- Must follow a weekly schedule – cannot be sporadic days throughout the semester.
- Separate Spend Authorizations are required for each course and section.
- Trip must occur during scheduled class time.

PROCEDURE:
- Fill out the Travel Admin Van Request Excel Spreadsheet.
- Include dates for the entire semester or block. (For example: 9/16-12/18)
- Provide a description (Example: RM 224B MW class)
- Travel Admin will Upload the Excel Sheet into Workday which will create your Spend Authorization. You will receive an email from Travel Admin when your Spend Authorization has been uploaded. The Spend Authorization will be in Draft form. **You will need to complete and Submit the Spend Authorization in order for it to route for approval or request vehicles.**
- Locate and Open your Spend Authorization in Workday and review for accuracy. (Go to Spend Authorizations on the Workday homepage or type My Spend Authorizations in the search bar.
- Add Fuel Expense if needed. Local trips are not required to refuel before returning the vehicle.
- Add any other expenses by clicking the + sign.
- Check your Cost Center.
- Submit the Spend Authorization and fill out the questionnaire. The request will not route for approval until the questionnaire is completed. If you have errors with your fleet item details, you will need to work with Fleet Services to correct the errors. (Fleet x2561)
- Attach a class list with I-Numbers for your Participant List. If you don't have this information at the time of submission, email the participant list to traveladmin@byui.edu when available. This list will be used in case of an emergency and will also provide information for Field Trip Insurance (when required).
- When the Spend Authorization is approved, you will receive a notification in Workday. (The bell icon next to your Workday Inbox.) You can always check the progress of your SAs by clicking on 'View Spend Authorizations' in the Expenses App of Workday. Click on 'Process History' to get information on where your request is in the approval process.
- **Once the SA is approved,** the vehicle requests will route to Fleet Services. You will receive emails from Fleet Services confirming the request and your reservations.
- If you have errors with your fleet item details, or need to make change - you will need to work with Fleet Services. (Fleet x2561)