

Travel authorization & travel voucher

A guide for the UVI community

Faculty, staff and students
Travel on university business

Before travel: approved TA
After travel: completed voucher and supporting documents

All university business travel must comply with the University's Travel Policy.

When travel documents are required

All university travel

Faculty, staff and students must complete and route both forms through SoftDocs.

Before the trip

Complete the TA weeks before travel and obtain approval before purchasing tickets or other travel items.

After the trip

Submit the travel voucher immediately upon the conclusion of the trip, with receipts and supporting documents.

No cost to UVI? A TA is still required.

Travel authorization and university coverage

The TA provides coverage while the employee is away on university business.

Complete the TA even when another organization pays the costs or there is no cost to UVI.

Indicate “No cost to UVI” in the funding source or memo field.

TA: traveler identification

Department Internal No.	Fiscal Year



University of the Virgin Islands

REQUEST FOR TRAVEL AUTHORIZATION

ST. THOMAS U.S. VIRGIN ISLANDS 00802

Traveler Information

Traveler Classification

- ☐ Employee
☐ Student

Name (In Full)

UVI ID

Date

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Title

Island

Department

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Enter the internal TA tracking number in the document number field. Select the fiscal year.

Select Employee or Student. Include full name, UVI ID and title.

Complete the date, island and department fields.

TA: dates, carrier and business purpose

Authorized Absence To Extend From (Date)	To
	(Close Of Business Day)
On University Payroll During Travel?	
Recommended Carrier/ Agent	
Destination	
Reasons For Travel (State University Business To Be Transacted)	

Enter travel dates and payroll status.

Identify the intended carrier based on the cost analysis.

Include the destination and reason for university travel.

TA: Account Information and funding distribution

Account Information

Add Row

Remove Row

Funding sources

Enter the fund number under Account Information. Include each funding source and its share of the travel costs.

Multiple funds

Use Add Row to add each funding source. Confirm that the distribution covers the total requested amount.

TA: estimates and approved amount

Per Diem For	Days	Transportation	
Taxi		Registration	
Hotel		Other	
		Description(for Other):	
Advance Required For Per Diem		Date	
Estimated Total	Amount Approved		
\$0.00			
Accounting Use Only			
Approved By:	Prepared By:	Date:	

Enter the estimated costs in the applicable expense categories.

Specify the requested amounts. Reviewer enters Amount Approved.

Accounting must confirm available funding before purchases.

TA: approval routing

Workflow Routing	
☐	Traveler
☐	Optional Approver
☐	Optional Approver
☐	PI
☐	Dean/Director
☐	Department Head
☐	Component Head
☐	Title III
☐	President
☐	Grant Accounting

Required: traveler, dean/director and department head.

Include PI and other approvers as applicable to the trip and funding.

Accounting or Grant Accounting approval is required before purchases.

Travel purchases after TA approval

Approval first

Begin making purchases related to the trip only after the travel authorization has received all required approvals.

UVI procurement

Make all travel purchases through UVI-approved procurement processes.

Personal funds

Travelers should refrain from using personal funds to purchase university-related travel.

Travel voucher: traveler and TA reference

Pay to	Employee No.

Mailing Address:			
Street or PO BOX			
City	State	Country	Zip Code

DESIGNATED HEADQUARTERS:	

DATES COVERED BY THIS VOUCHER:		
	From:	To:

Note: If applicable, enter the TA#(department-generated internal tracking number).

TA#

Complete and route the travel voucher through SoftDocs immediately after the trip.

Include name, employee number and complete mailing address.

Enter the dates covered. Use the TA's internal tracking number in the TA# field.

Travel voucher: distribution and costs

DISTRIBUTION		AMOUNT
FARES – PUBLIC TRANSPORTATION - TAXI (attached receipts)		
		\$ 0.00
Receipts required, except taxi, bus, or limousine. Fares under \$2.51		
PERSONAL CAR MILEAGE,	Miles @ 35¢	\$ 0.00
PER DIEM ALLOWANCE and/or MEALS & LODGING		\$ 0.00
Add Row		Remove Row
*Tax Exemptions status must be shown on Receipts		Total: \$ 0.00

Complete the funding distribution. Use Add Row as needed.

Include all costs incurred and the amount for each expense.

Attach itemized invoices, receipts and other supporting documents.

Voucher receipts and supporting documents

All costs incurred

Include all trip costs on the voucher and attach support for each expense.

Approved TA and receipts

Attach a copy of the approved TA, along with itemized invoices and receipts supporting the amounts reported.

Prorated expenses

Clearly identify each prorated expense and explain how the amount was calculated.

Boarding passes are REQUIRED for reimbursement on all Fund 2 travel.

Currency conversion support

Attach a sheet that connects each foreign currency receipt to the amount reported on the voucher.

Receipt details

Identify the expense, receipt date, original currency and original amount.

Rate applied

Show the conversion rate used for each applicable expense.

Calculation

Show the calculation and resulting U.S. dollar amount reported.

Travel voucher: approval routing

Workflow Routing

☐ Traveler

☐ Optional Approver

☐ PI

☐ Department Head

☐ Component Head

☐ Title III

☐ Grant Accounting

Accounting Email

Traveler reviews and approves the completed voucher.

Route to the PI, department head or component head as needed.

Include Accounting or Grant Accounting for review and approval.

Internal tracking number links the TA and voucher

Travel authorization

Enter the internal TA tracking number in the document number field at the top of the TA. Select the fiscal year.

Travel voucher

Enter the same tracking number in the TV's TA# field and attach a copy of the approved TA in SoftDocs.

One trip, one reference

Use the tracking number assigned to that specific trip.

Separate travel authorizations for each trip

One TA per trip

Each trip requires its own travel authorization. A TA approved for one trip cannot be used for another trip.

Separate documentation

Keep travel authorizations and related expenses separate for each trip. Do not combine or commingle trips.

Voucher reference

Reference the TA for that specific trip on the travel voucher.

Expense changes and amended travel authorizations

Substantial changes

Submit an amended TA with the adjustments needed when expenses change substantially from the approved TA.

Amended TA

Complete and route the amended TA through SoftDocs for the required approvals.

Travel voucher

The travel voucher should be reasonably similar to the approved TA, including any approved amendments.

Travel submission checklist

Before purchases

TA complete, travel dates included, funding identified and all required approvals obtained.

During travel

Retain itemized invoices, receipts and other supporting documents for all costs.

Immediately after travel

Complete the voucher, attach the approved TA and all support, and route for approval.

Every university business trip requires travel documentation.