

Travel Request System Quick Guide

All Travel Authorizations and Reimbursements (except for team/group travel) must be processed through Mason’s electronic travel resource, the Travel Request System (TRS) <https://travel.gmu.edu/>. The TRS must be accessed on the [VPN network](#). Mileage, per diem rates and lodging maximums are embedded in the system, and calculations are performed based on travel dates and location(s) entered. The TRS design includes a delegate feature in which a traveler, department chair or supervisor may designate a Mason staff member to complete electronic Travel Authorizations and Reimbursements on behalf of others. Additional delegate information is available in [Getting Started](#) Guide.

Trip Type, Approvals and Documentation

All Mason funded travel requires approval prior to the start of the trip. The traveler or delegate must upload documentation, such as receipts, to the Reimbursement request. Approvers must view the attached documents/receipts before approving/returning a document to the traveler or delegate. **All required receipts must be uploaded and attached to the Travel Reimbursements in order to be processed by the Travel Office.** Travel Reimbursement requests should be submitted within 60 days of trip completion. Travelers should retain original receipts until reimbursement has been received. Additional guidance on uploading documents may be found on the [TRS Document Upload Guide](#).

Trip Type - Determining Factors	Required Approvals	Examples of Documentation
<i>The following Domestic* trip types require <u>Oral approval</u> prior to trip start date. A Travel Authorization in TRS is not required. After the trip completion, a Reimbursement request may be submitted in TRS for actual expenses.</i>		
Standard Overnight: Where overnight accommodation cost is less than \$1,000 AND Lodging is at the basic rate	Authorized Approver/Supervisor AND Fund/Org Approver	~Airline, Baggage Fee, Lodging and Registration receipt(s) ~Shuttle, Taxi, Cab receipt (if over \$75) ~Conference or meeting Agenda
One Day Trip: Where no overnight accommodation or per diem is used AND cost is less than \$1,000	Authorized Approver/Supervisor AND Fund/Org Approver	~Rental car and gas receipt ~Registration receipt ~Conference or meeting Agenda
Transportation Only: Where only transportation cost(s) are being requested	Authorized Approver/Supervisor AND Fund/Org Approver	~Mileage calculation/print out ~Metro, Shuttle or Rental car receipt
<i>The following trip types require <u>Electronic approval</u>. A Travel Authorization must be submitted and approved in TRS prior to the trip start date. After trip completion, a Reimbursement request may be submitted in TRS for actual expenses.</i>		
Extended Trip: Domestic* trip where cost is \$1,000 or more AND/OR Lodging is above basic rate**	Authorized Approver/Supervisor AND Fund/Org Approver	~Airline, Baggage Fee, Lodging and Registration receipt(s) ~Shuttle, Taxi, Cab receipt (if over \$75) ~Conference or meeting Agenda
International Trip: Travel to Hawaii, Alaska or other location outside of the contiguous U.S.	Authorized Approver/Supervisor AND Fund/Org Approver	~Airline, Baggage Fee, Lodging and Registration receipt(s) ~Shuttle, Taxi, Cab receipt (if over \$75) ~Conference or meeting Agenda ~Currency conversions
International Trip: Travel to comprehensively embargoed country, a militarily embargoed country when working with ITAR data, countries or areas under US State Dept. Travel Advisories or CDC Level 3 & 4, or countries under comprehensive economic sanctions	Authorized Approver/Supervisor AND Fund/Org Approver AND Office of Research Integrity and Assurance (RDIA) AND/OR University Travel Advisory Committee (UTAC)	~Airline, Baggage Fee, Lodging and Registration receipt(s) ~Shuttle, Taxi, Cab receipt (if over \$75) ~Conference or meeting Agenda ~Currency conversions
Traveler is a nonimmigrant VISA holder	Authorized Approver/Supervisor AND Fund/Org Approver AND International Tax office	~Airline, Baggage Fee, Lodging and Registration receipt(s) ~Shuttle, Taxi, Cab receipt (if over \$75)

***Domestic includes the contiguous United States only and does not include Alaska or Hawaii. Travel to Alaska, Hawaii, Puerto Rico or other U.S. territories is considered International Travel.**

****Overnight travel at any dollar amount (more than, less than or equal to \$1,000) that includes lodging costs over the basic rates requires written approval in advance of the travel.**

Complete a Travel Authorization

1. Open a Firefox internet browser (VPN required for remote use), Go to <https://travel.gmu.edu> and login. Note: Delegates will enter the Traveler's email, select the Traveler's status and submit. Delegate will then be asked to Login.
2. Select *Enter Travel*, then *Initiate Authorization* and click the Continue button.
3. Select Trip Type (Extended or International) and click the Continue button.
4. Enter Trip Information. *Authorized Approver/Supervisor's Net ID* - will automatically populate, but may be changed if needed.
5. Enter Fund/Org Information and choose Approver - select department from the drop-down list; enter the fund or org to be charged and select Approver. If charging multiple funds/orgs, indicate either the dollar amount or percentage to be charged to each fund/org.
6. If needed, enter *Optional Approvers Net ID* and choose "Before" or "After" Authorized Approver/Supervisor.
7. Enter *Primary Transportation*. Enter the air carrier when traveling internationally charging Federal funds.
8. Enter *Secondary Transportation* for Origin City and Destination facility. Enter a description when choosing Other.
9. Enter Location by selecting from drop-down list; if not included in the drop-down select *other location NOT listed above*, type in city and select state.
10. Enter *Lodging* – rates display based on the location. If you are choosing the conference lodging rate, provide an explanation, e.g. conference hotel. For international locations/rates, follow links.
11. If room sharing, enter additional traveler name and identify if individual is a Mason employee.
12. Enter *Event* name or description. Enter meals provided, except for travel days
13. Enter *Car Rental* if applicable
14. Enter Estimated *Miscellaneous Expenses*.
15. Review information, select *Edit Info* to edit any section. Edits may be made to the authorization any time prior to submitting for approval; you may exit the system and then log back in to make edits.
16. Select *Upload receipts/documentation* to attached documents to travel authorization when required.
17. Use *Comments* section to provide clarification or additional information.
18. Select the Submit for Approval button to begin the Workflow approval process.
19. Select Continue and then Yes. Additional comments may be entered under *Preparer Comments*.
Note: Traveler/delegate will receive an email stating that the approval process has begun. Another email will be sent once the document has received all required approvals.
20. Travel is not authorized until all required approvals have been received.

Completing a Travel Reimbursement

1. Open a Firefox internet browser (VPN required for remote use), Go to <https://travel.gmu.edu> and login (note delegate login above)
2. Select *Enter Travel*. For Reimbursement only trips select "Initiate Reimbursement", enter trip details then proceed to Step 5.
3. For trips where a TRS Authorization was required and submitted, select *View/Edit Trip*.
 - All trips will be displayed
 - Select *Initiate Reimbursement* next to Trip Name to begin or *View/Edit Authorization/Reimbursement* to update an existing reimbursement.
4. Edit section(s) based on actual travel costs by selecting blue *Edit Info* links. Enter new and/or revised information and select Continue.
5. Select *Upload receipts/documentation* to add ALL required receipts and additional documentation. Note file upload requirements before attempting to attach documentation. [Document Upload Guide](#).
6. After edits are completed, scroll down and select *Submit for Approval* to begin the Workflow process.
7. Select Yes and then Continue. Additional comments may be entered under "Preparer Comments."
Note: Traveler/delegate will receive an email stating that the approval process has begun. Another email will be sent once the document has received all required approvals.

Submitting Travel Expense Reimbursement Voucher

1. The Authorized Approver/Supervisor and/or Fund/Org Approver must verify that all required receipts have been attached to the reimbursement request before approving the document in Workflow.
2. Once all approvals are received the Travel Office will receive the reimbursement request and view the attached receipts for accuracy and Policy compliance.
3. Original receipts/documentation should be retained by the traveler until AFTER reimbursement has been received. If the Travel Office is not able to read/view a receipt or if documentation is missing the traveler/delegate may be asked to submit the original receipt before a reimbursement is generated to the traveler.

The complete [TRS User Guide](#) provides additional information on processing documents as well as screenshots of the system. Please contact the Travel Office at travel@gmu.edu for additional assistance.