Student Travel – Initial Instructions

Students who will be traveling will need to complete the following three steps, prior to creating any travel documents required by the University, to receive approval to travel.

1st Step: Create a User ID in Financials.
For anyone new to Financials, student or employee, there is a new procedure for obtaining a User ID and password in Financials. The new process is to login to e-Campus (either Faculty & Staff or Student e-Campus) and from the main menu, go to the Change Password option, and change their password in e-Campus. This will create a User ID and password in Financials that will mirror the user’s credentials in e-Campus. This change is campus wide and is not related to the Travel and Expense Module.

The student’s professor or a department administrative person can help the student complete the form. Either the professor or department administrative person must sign and forward the form per the instructions on the form.

Note:

- The professor will be the student’s Supervisor. The student will also need a department administrative person to serve as a delegate. The Professor cannot be the delegate because if they create or submit the form for you, they will not be able to approve the form online.
- **A delegate is required for all students, graduate and undergraduate.** The student will be able to create the travel authorization and/or expense report, save the document and click submit. However, when the form is submitted, it will **not** go into workflow for approval. An email notification will be sent to the student delegate. The delegate will then have to go into the Travel and Expense Module to **modify** the document. After reviewing the travel document and making any necessary corrections, the delegate can then submit the travel document for approval. Delegates **do not** access the student travel documents from their worklist.
- Below is a link to the PS Financials Security Access Request Form which can also be found on the Controller’s Website, under the Forms tab, then scroll to the bottom of the page. You will be notified by the PS Financials Dept. once you have access.

**Student Travel – Initial Instructions**

**3rd Step: Enter your Direct Deposit Information in Financials.**
Once you have access to Financials, you will be able to login to Financials and enter your banking information so that you will be reimbursed for out of pocket travel related expenses via direct deposit. On the Travel Website is a Travel and Expense Module Reference Guide which contains a table of contents for easier use. This guide contains all the instructions needed in relation to the Travel and Expense Module. It is accessed via the A-Z Directory, “T” for Travel. Go to Direct Deposit instructions. Below is a link to the guide.

Once these steps are completed, students will need to gather estimated costs related to their travel and meet with either their professor or their department administrative contact, to complete the Travel Authorization needed prior to travel, and/or their Expense Report, if reimbursement of expenses paid by the student is needed.