GETTING STARTED WITH PROFILER
(TO BE COMPLETED BY TRAVELER)

1. Travelers whose documents are processed through eTravel must be UH Employees with an active PeopleSoft record. (If the traveler does not have a PeopleSoft record, then their travel documents must be processed on a manual DISB-4 Form.)


3. Click “Login Now.”

4. Enter UH User Name and Password. Click “Login.”
5. Click “My Position Profile.”

<table>
<thead>
<tr>
<th>UH Username</th>
<th>Name</th>
<th>Position Title / Department</th>
<th>May Edit My Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

6. Click “My Preparers” tab.

7. Select “eTravel” from the pull-down menu and click “Add.”

8. Enter UH usernames of the individuals who are to prepare documents on the traveler’s behalf.

9. Click “Update” when completed. The designated preparer(s) should now be able to select the traveler in eTravel.
GETTING STARTED WITH ETRAVEL


2. Click “Login.”

3. Enter UH User Name and Password. Click “Login.”
TRAVELER INFO | TRIP INFO

1. Click “New Travel Request.”

CREATE NEW TRAVEL REQUEST

TRAVELER INFO

<table>
<thead>
<tr>
<th>Traveler:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bargaining Unit:</td>
</tr>
</tbody>
</table>

2. Traveler: Select traveler. Traveler’s bargaining unit will automatically populate. Note: Only travelers who are UH Employees with an active PeopleSoft record can be processed through eTravel. Additionally, the traveler must have designated you as a preparer. See Getting Started with Profiler section for more information. (If the traveler does not have a PeopleSoft record, then their travel documents must be processed on a manual DISB-4 Form.)

TRIP INFO

<table>
<thead>
<tr>
<th>Travel Dates:</th>
<th>From:</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination:</td>
<td>(where costs incurred)</td>
<td></td>
</tr>
<tr>
<td>Itinerary Type:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Travel Dates: Enter starting and ending dates of travel.

4. Destination: Select appropriate destination.
   a. Intra-State, Same Day
   b. Intra-State, Overnight
d. Out-of-State, Foreign (OCONUS – Outside of Contiguous United States of America):

i. Examples: Hawaii; Alaska; U.S. Territories such as Guam, etc.


e. Mixed Destination: Any combination of the above destination types.

i. Example: Traveler will first go to Kauai for an overnight stay (Intra-State, Overnight) and then to Japan (Out-Of-State, Foreign).

5. Itinerary Type: Select appropriate itinerary type.

a. EZ (One Leg): Select if there is only one leg on airfare itinerary.

b. Itemized (Multi Leg): Select if there are multiple legs on airfare itinerary, including connecting flights, stopovers, and personal time.
PAYMENT & FUNDING INFO


7. Process Travel Via: Select appropriate disbursing office or “None – No Cost Travel.”
   a. UH Disbursing Office: Select if using accounts G (1-), S (2-), or R (3-).
   b. UH Foundation Office: Select if using UH Foundation account.
   c. None – No Cost Travel: Select if no cost to UH or UHF. Select only if all costs (i.e. lodging, airfare, meals, taxi, parking, etc.) will be paid for by an external entity.

8. No. of Account Codes: Designate the number of account codes that will be funding the travel.

   a. By Percentage: Default account method if only one account code is used. Select if using multiple accounts where expenses can be distributed by percentage. For example, Acct #1234567 covers 70% of the total cost while Acct #3216547 covers the remaining 30%. This is the simplest and most automated accounting method. Use as much as possible.
   b. Fixed Amount: Select if using multiple accounts where amounts for each account are fixed. For example, Acct #1234567 covers $200 of the total cost while Acct #3216547 covers $400.
   c. Manual: Select if using multiple accounts where amounts for each account and subcode are fixed. For example, Acct #1234567, O/C 4450 covers $75; Acct #1234567, O/C 4550 covers $25; Acct #3216547, O/C 4450 covers $100; Acct #3216547, O/C 4850 covers $300.

10. Claim Travel Advance: Indicate if traveler is claiming an advance.

11. Click “Next.”
JUSTIFICATION | COVERAGE | SOURCE OF FUNDS

12. Primary Category: Select the appropriate business activity type.

13. Justification:
   
   
   b. If attending a conference, then attach brochure/agenda showing descriptions, dates, and times. If attending an informal business meeting/collaboration, then attach written documentation (e.g. email) from the Principal Investigator providing details.
   
   c. UH Employees: If attending a hands-on training session, then complete and attach UH Form 410 Training Request Form: http://www.hawaii.edu/ohr/bor/forms/uh410.pdf
   
   d. Note personal time, if any.
      
      i. A separate business-only itinerary without personal time must be obtained at the same time as the business + personal time itinerary. For a small fee, travel agencies can obtain these alternate itineraries.

14. Coverage of Duties: Enter the individual who will be covering the traveler’s administrative duties.

15. Source of Funds: Enter the account code(s) that will be funding the travel.
16. Itinerary: Enter traveler’s itinerary.

   a. Due to heightened security measures in place at airports as a result of the September 11, 2001 incident, the following pre-boarding allowances are afforded to employees. These allowances may be taken into consideration when calculating the start time of M&E.

      i. In-State Travel: Not to exceed 90 minutes prior to departure time

      ii. Out-of-State Travel: Not to exceed 3 hours prior to departure time

   b. Include connecting flights, which must be designated by clicking the “Connecting” box.

   c. Include unavoidable stopover(s) where an expense (e.g. lodging) is incurred.

   d. Include legs where personal time is incurred. Enter the number of personal days in the “Pers Days” field under the “Minus Days” column.

      i. A separate business-only itinerary without personal time must be obtained at the same time as the business + personal time itinerary. For a small fee, travel agencies can obtain these alternate itineraries.

   e. Additional legs can be added by clicking the arrow symbol in the “Leg ID#” column. Legs can be deleted by clicking the trash can symbol in the “Leg ID#” column.

   f. Once all information is entered, click “Calculate.” The system will automatically calculate travel and business days.
**LODGING**

<table>
<thead>
<tr>
<th>BU RATE</th>
<th>EST'D RATE</th>
<th>DAYS CLAIM</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOGO</td>
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<tr>
<td>MIKE</td>
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<td></td>
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<tr>
<td>P.O.</td>
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<td></td>
<td></td>
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<tr>
<td>SUBT</td>
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<td>1</td>
</tr>
</tbody>
</table>

17. Lodging: Enter “B.U. Rate” (FAR), “Est’d Rate” (i.e. hotel rate + room taxes), and “Days Claim.”


      i. Print and attach a copy of the FAR for the business destination(s).

   c. Excess lodging is defined as the lodging amount greater than the applicable lodging rate afforded to the employee. For example:
      i. Actual Hotel Lodging Rate per Day: $200.00
      ii. FAR Lodging Rate for Employee per Day: $180.00
      iii. Excess Lodging Amount per Day: $20.00

   d. Excess lodging quotations:
      i. Staying at Conference Hotel: No quotes
      ii. Staying at Non-Conference Hotel: One (1) additional quote

   e. **Economy** lodging accommodations only.

   f. If personal time is involved, then calculate and reimburse business days only.

   g. Attach lodging reservation/confirmation to travel request. Reservation/confirmation should show the employee’s name and an estimated lodging rate.
M&IE

<table>
<thead>
<tr>
<th>BU.RATE</th>
<th>EST'D RATE</th>
<th>DAYS CLAIM</th>
<th>COST</th>
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<tbody>
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</table>

18. M&IE: Applicable to all destinations EXCEPT for Intra-State, Same-Day Travel: Enter “B.U. Rate” (FAR), “Est’d Rate” (FAR or department-designated), and “Days Claim.”

a. Bargaining Unit (BU) Rates: [http://www.hawaii.edu/etravel > “Allowable Rates” > “Bargaining Units 07, 08, 87, 88 (E/M), 57, 67, 68, 78, SCOPIS, RCUH, State Employees (Non-UH)]

   i. Print and attach a copy of the FAR for the business destination(s).

c. M&IE is calculated at quarter day periods according to the following chart:

<table>
<thead>
<tr>
<th>If time of Departure/Return falls within:</th>
<th>Then the following fraction is allowed on day of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Departure</td>
</tr>
<tr>
<td>12:01 am – 6:00 am</td>
<td>1.00</td>
</tr>
<tr>
<td>6:01 am – 12:00 pm</td>
<td>0.75</td>
</tr>
<tr>
<td>12:01 pm – 6:00 pm</td>
<td>0.50</td>
</tr>
<tr>
<td>6:01 pm – 12:00 am</td>
<td>0.25</td>
</tr>
</tbody>
</table>

   i. Examples:

1. Departure Day: If Departure Time is 4:00pm, then traveler is allowed 0.50 M&IE for that departure day, i.e. the time from 4:00pm to 12:00am (end of the departure day) is 0.50 day.

2. Return Day: If Return Time is 3:00pm, then traveler is allowed 0.75 M&IE for that return day, i.e. the time from 12:01am (start of the return day) to 3:00pm is 0.75 day.

3. All Non-Departure/Non-Return Days: Traveler can claim the appropriate number of whole (1.00) days.
d. M&IE rate is comprised as follows:

   i. Breakfast: 20%
   ii. Lunch: 30%
   iii. Dinner: 50%

e. Employees may not claim for any meal and incidental costs in excess of their M&IE rate. There is no excess meals provision. Employees should be informed of this provision when selecting meals at an additional cost (usually at conferences). In such instances, the additional cost for the meal shall not be reimbursed (i.e. the conference fee receipt shall be amended to exclude the additional cost for the meal).

f. If personal time is involved, then calculate and reimburse business days only.

19. M&IE: Applicable ONLY to Intra-State, Same Day Travel: Enter 20.00 in “Est’d Rate” field and enter 1.00 in “Days Claim” field.
20. Estimated Expenditures: Select the appropriate expense type and payment method. Enter any PO numbers and/or notes in “Detail” fields. Enter estimated amount for each expense type. To add additional expense lines, select the appropriate expense type from the pull-down menu and click “Add Expenditure.”

a. Airfare: Enter total cost of airfare. If PO was initiated, then enter PO number.

i. Economy/Coach class accommodations only.

ii. Itinerary should be most direct, practical, economical & reasonable route.

1. Document any unavoidable stopovers due to flight unavailability.

iii. If personal time is involved, then obtain separate business-only and business + personal itineraries at the same time. For a small fee, travel agencies can obtain these alternate itineraries. The cost of the cheaper itinerary should be entered. All calculations for M&IE, lodging, etc. will be based on the business-only itinerary.

iv. If total cost exceeds $2,500.00, then obtain three comparable quotes at the same time. For a small fee, travel agencies can obtain these comparable quotes. The amount of the lowest quote should be entered.

v. If federal funds are being utilized, then accommodations should be made on U.S. Flag Carriers in accordance with the Fly America Act (reference Federal Acquisitions Regulation (FAR) 47.402).

vi. Attach airfare reservation/confirmation/receipt to travel request. If employee already paid for airfare in advance, then the receipt should show employee’s name and proof of payment, e.g. “Balance Due = $0.00,” “Charged to AMEX XXXX,” etc. Credit card statement not necessary if sufficient proof of payment is provided.
b. Conf/Regis Fee: Enter total cost of conference/registration fee. If PO was initiated, then enter PO number.

   i. Attach conference confirmation/registration form to travel request. If employee already paid for conference fee in advance, then attach a receipt showing employee’s name and proof of payment, e.g. “Balance Due = $0.00,” “Charged to AMEX XXXX,” etc. Credit card statement is not necessary if sufficient proof of payment is provided.

   ii. See M&IE section if registration includes meals purchased at an additional cost.

   iii. If registration involves membership fee, then complete and attach JABSOM Request for Membership in Professional, or Trade Organization Form: http://jabsom.hawaii.edu/JABSOM/departments/ofaa/doc/JABSONMMembershipForm.xls

c. Taxi/Shuttle: Enter total cost for business-related trips only.

d. Car Rental: Enter total cost of car rental. If PO was initiated, then enter PO number.

   i. Consider alternate, cheaper ground transportation methods first such as taxis or shuttles from airport to hotel. All car rentals must be justified. (Gas and insurance purchases are additional expenses with car rentals.)

   ii. Economy/compact/sub-compact accommodations only.

   iii. If intending to rent a larger vehicle, then supervisor shall provide their authorization in the comments section of the travel document.

   iv. All insurance options should be declined for in-state car rentals. Only basic Collision Damage Waiver is permitted for out-of-state car rentals.

   v. If personal time is involved, then calculate and reimburse business portion only.

   vi. Attach reservation/confirmation to travel request. Reservation/confirmation should show the employee’s name and an estimated amount.
e. Mileage


   1. Print and attach a copy of the FAR for the business destination(s).

iii. Mileage can only be claimed when using a personal vehicle from home to the Honolulu International airport and vice versa under the following circumstances:
   1. If commuting during business hours, then only miles in excess of normal commute to work can be claimed. For example:
      a. Home – Work – Airport (claim Work – Airport)
      b. Home – Airport – Work (no claim permitted)
   2. If commuting during non-business hours, then all miles can be claimed regardless of distance between the locations. Thus:
      a. Home – Work – Airport (claim entire trip)
      b. Home – Airport – Work (claim Home – Airport)

iv. Enter estimated mileage amount. (Complete a manual mileage form at time of travel completion.)

f. Other: Enter total cost of other estimated expenses. If PO was initiated, then enter PO number.

i. Baggage Fees: See attached [memorandum](http://example.com).

ii. If personal time is involved, then calculate and reimburse business portion only.

iii. Attach appropriate supporting documentation to travel request.

21. Advance: Enter amount to be advanced to traveler for each expense type in the “Advance” field. (Note: Any expenses that are paid by UH cannot be advanced.)

22. Click “Calculate.” System will automatically calculate all expenses.
23. Account Information: **Percentage Split Option**: Enter account code(s) and the percent to be paid by each account code.

24. Account Information: **Fixed Amount or Manual Option**: Enter account codes and their respective amounts in the “Est’d Exp Balance Amount” and “Advance Amount” (if claiming an advance) fields.

25. Comments: Enter comments/notes as needed. Explain unusual circumstances and provide any other information to assist Fiscal Administrator with review.

26. Save: Click “Save.”

27. Submit: Click “Submit.”

28. Print w/ Lines: Click “Print w/ Lines.” Print travel request on pink paper (preferred but not required).

29. Attach all supporting documentation to travel request.
APPROVALS | CHECKLIST | SUBMITTING TO OFAA

1. Obtain the following approvals on the travel request:

<table>
<thead>
<tr>
<th>Person</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler</td>
<td></td>
</tr>
<tr>
<td>Approving Authority</td>
<td>If same as Traveler then obtain counter-signature from Department Chair</td>
</tr>
<tr>
<td>Department Chair</td>
<td>Required for all travel requests</td>
</tr>
<tr>
<td>Dean</td>
<td>If Traveler is Department Chair, then obtain signature from Dean</td>
</tr>
</tbody>
</table>

2. Double-check for and label the following documentation prior to submitting to the Office of Fiscal & Administrative Affairs:

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed, Signed Travel Request</td>
</tr>
<tr>
<td>FAR printout</td>
</tr>
<tr>
<td>Conference Brochure, Agenda, or Other Documentation</td>
</tr>
<tr>
<td>UH Form 410 Training Request (if applicable)</td>
</tr>
<tr>
<td>Airfare Itinerary/Confirmation</td>
</tr>
<tr>
<td>Receipt (if available)</td>
</tr>
<tr>
<td>Alternate Business-Only Itinerary (if applicable)</td>
</tr>
<tr>
<td>Lodging Confirmation</td>
</tr>
<tr>
<td>Ground Transportation Confirmation</td>
</tr>
<tr>
<td>Conference Confirmation/Registration Form</td>
</tr>
<tr>
<td>Receipt (if available)</td>
</tr>
<tr>
<td>JABSOM Membership Form (if applicable)</td>
</tr>
<tr>
<td>Information for Other Costs</td>
</tr>
</tbody>
</table>

3. Route original travel request and supporting documentation to the O at least fifteen (15) business days prior to departure date for both advances and non-advances.
# RESOURCES

## Sites:

<table>
<thead>
<tr>
<th>Site</th>
<th>URL</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>UH eTravel</td>
<td><a href="http://www.hawaii.edu/etravel">http://www.hawaii.edu/etravel</a></td>
<td></td>
</tr>
<tr>
<td>UH eTravel Training Site</td>
<td><a href="http://www.hawaii.edu/etravel/training">http://www.hawaii.edu/etravel/training</a></td>
<td>Login: trvfo5&lt;br&gt;Password: aloha</td>
</tr>
<tr>
<td>JABSOM OFAA Site</td>
<td><a href="http://blog.hawaii.edu/ofaa">http://blog.hawaii.edu/ofaa</a></td>
<td></td>
</tr>
</tbody>
</table>

## References:

<table>
<thead>
<tr>
<th>Reference</th>
<th>Links</th>
</tr>
</thead>
</table>
| UH Administrative Procedure Manual | • [Section A8.851 Out-of-State and Intra-State Travel](http://www.hawaii.edu/etravel/training)  
• [Section A8.852 Personal Automobile Mileage Voucher](http://www.hawaii.edu/etravel/training)  
• UH Budget Categories |
| Federal Allowable Rates       | • [http://www.gsa.gov/perdiem](http://www.gsa.gov/perdiem) |
| Oanda (Currency Converter)    | • [http://www.oanda.com/convert/classic](http://www.oanda.com/convert/classic) |