Create Pre-Approval

Pre-approvals provides pre-authorization for travel expense(s) before it is incurred or a reservation is processed. Pre-Approval are required for overnight in state, out of state, and foreign travel.

How to Create a Pre-Approval:

1. From the Dashboard, tap the **+NEW** button in the upper right corner and select **NEW PRE-APPROVAL REPORT** from the drop-down menu.

2. The types of fields and drop-downs on the **Pre-Approval Header Entry** screen are required. The **Report Name** should detail the name of the conference or location with travel dates. The report name is the first indicator/reference for the approver and traveler on what specific travel is requested. Other required fields include:

- **Start/End Dates**: Dates of Travel (including personal time if included with business travel)

- **Number of Days**: Automatically determined by Start and End dates.

- **Pay Me In:** Auto defaulted to USD – US Dollars.

- **Business Purpose**: The business-related reason for the travel. Benefit to SHSU. *(Same information provided in Doc Text for Banner Requisitions)*

- **Destination City, State, Country:** Specific travel destination.

- **Start/End Times:** Select a range that best meets the travel

- **Travel Type:** Drop down list of options to select – Conference, Meeting, etc.

- **Location:** Instate/Outstate/Foreign/Study Abroad – ***Selected option determines the routing for approvals.***

- **No Cost to SHSU:** Only check box if expense will be paid for by another institution/association.

- **Travel Next Year?:** Only check box if travel takes place in next fiscal year (FY). SHSU fiscal year ends 8/31. If travel is submitted for 9/1 or later of FY19 and the current date is within FY18, the box should be checked identifying future FY travel. Start/End Date should be actual date of travel, reflecting 9/1 or later date.

- **Vendor:** Only selected if travel is for a student organization/individual student/guest speaker/prospective employee.

- **Allocations**: Fund Org Combination (FOAP). Search the list by typing in the first four digits of the number of the Org, then and all funds associated with the Org will appear. Then select the Fund Org to be used for encumbrance /expenses.

- **Allocation (cont**.): Once you have selected the Fund Org combo, two boxes will appear. The first field is to select a Program Code – select the program code associated with your department/purpose from the drop down list. The second field is to select an Activity Code. Many departments to not use Activity code, so if this is true for your department, then select 00000 – Default Activity, from the drop down list.

- Additional allocation can be selected if necessary by clicking **ADD ALLOCATION.**

Once the header information is complete, you will be able to add potential expenses to encumber the estimated amount. Click SAVE to continue.

Click SAVE after all required information is complete

3. **Add Pre-Approval Types** screen will appear. Select the specific expense tile to enter the estimated amount intended for category.
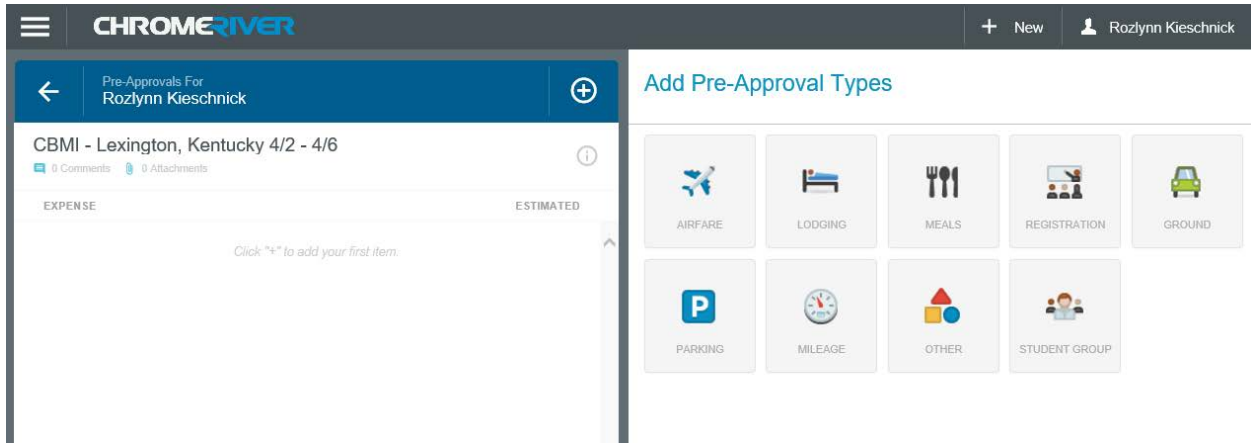

4. Tapping on an expense-type tile takes you to the Add Expense screen for that type. Enter the required information and tap **SAVE**.
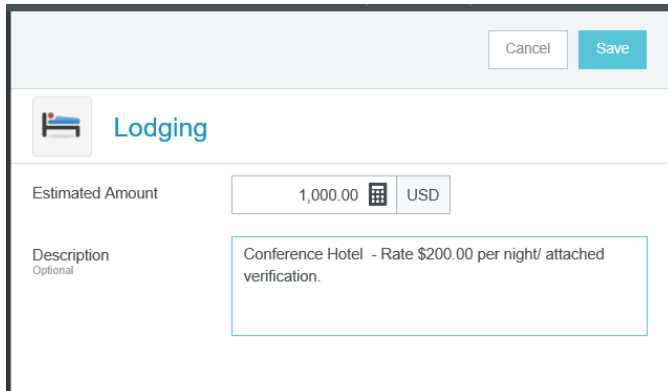

5. After the selection is saved, it will appear on the left of the screen and begin building the report. To return to the expense tile options Click the **+ Button** and then select additional expense type and provide estimated amount. Once all items are complete. Submit the Pre-Approval.

+ Button to add additional expense
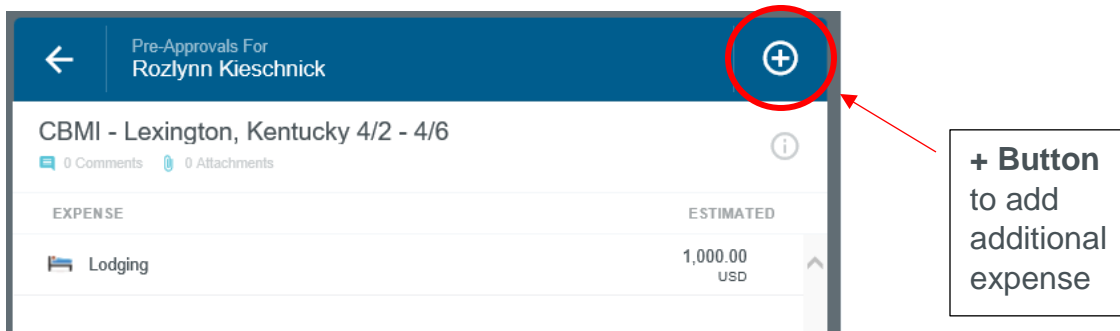
6. **Attachments:** Supporting documentation (waivers, cost comparison, approved exemption forms, etc.) Simply click the blue paperclip, under the Report Name and the Upload Attachments option will appear on the right side of screen, under the report summary, at the bottom of the page (scroll to the bottom).
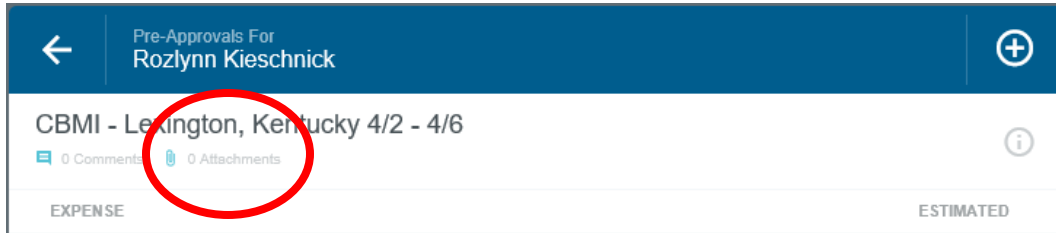
Click on Upload Attachments. Browse computer files and attach appropriate document(s). Save. Image will appear under the attachment section.
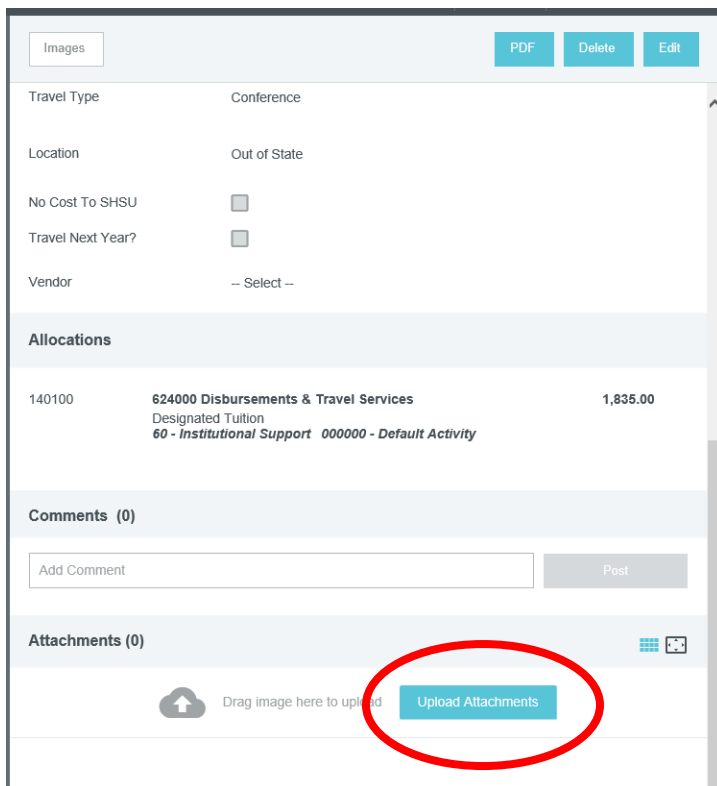
Document types able to be attached are PNGs, JPEG, PDFs, CSVs.

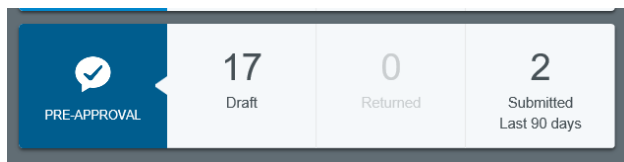7. Report is complete. Select Submit.

8. Submit confirmation statement. If actual expense exceed the Pre-Approval estimate, then additional approval will be required on the Expense Report when submitted.

9. Report will appear on dashboard as a submitted Pre Approvals. Click on the submitted column to see details.

10. **Status of Submitted Pre-Approval Reports**

- Pending approval: Currently in approval queues, awaiting approval
- Approved: All approvals obtain, waiting to transfer to Banner
- Used/Expired: Pre-Approval applied to Expense Report

11. Pre-Approval will feed to Banner through-out the day. Available budget within Banner will reduce, as pre-approvals are imported.