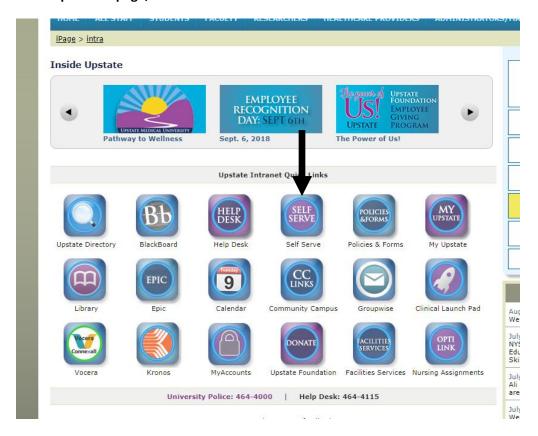# How to Complete a Travel Authorization in Self-Serve for State Employees
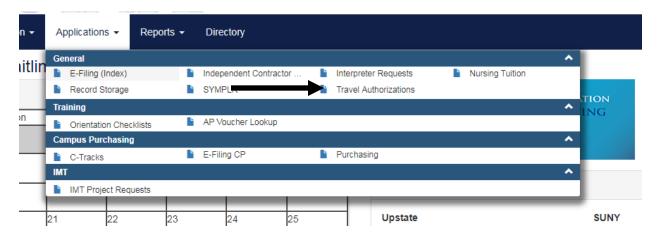
Go to Upstate's Ipage, click on the Self-Serve link.
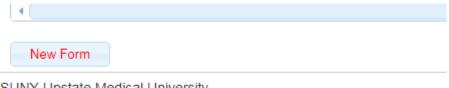

Log into Self-Serve

Go to applications then Travel Authorizations

When the travel authorization application has been open, there are three different option to review; awaiting department head (which is the main page), completed or archived. The only time to use archive is when a mistake has been made and a new travel authorization will need to be submitted.
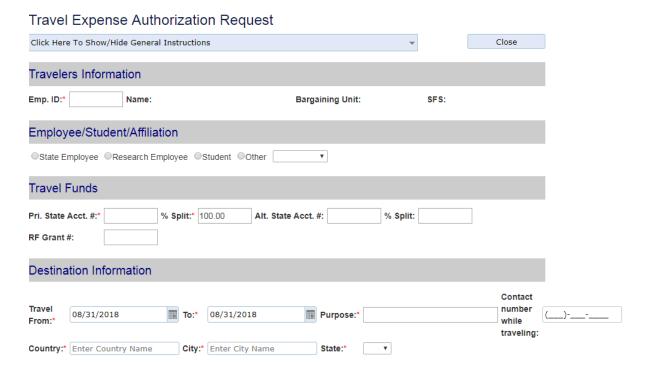

Any state employee can enter in a travel authorization for either themselves or another employee. When putting in a new travel authorization, there is a button in the bottom left hand corner to enter in a new form.
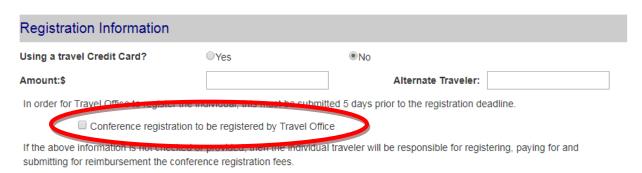

New Form

SUNY Upstate Medical University
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Self-Serve Web Team

When entering a new form – the travel authorization request form will appear which then the employee filling out the form will need a state employee ID number, primary account number and all the information for the trip. There is an option to enter more than one account number for each trip; make sure to list how each trip will be split up.

Travel Expense Authorization Request

Click Here To Show/Hide General Instructions	▼	Close

Travelers Information

Emp. ID:* [   ]   Name: Bargaining Unit: SFS:

Employee/Student/Affiliation

○ State Employee   ○ Research Employee   ○ Student   ○ Other   [▼]

Travel Funds

Pri. State Acct. #:* [   ]   % Split:* [100.00]   Alt. State Acct. #: [   ]   % Split: [   ]

RF Grant #: [   ]

Destination Information

| Travel From:* | 08/31/2018 📅 | To:* | 08/31/2018 📅 | Purpose:* [   ] | Contact number while traveling: (___)-___-____ |

Country:* [Enter Country Name]   City:* [Enter City Name]   State:* [▼]

If a state employee needs the travel office to complete a registration, click the button shown below.

Registration Information

Using a travel Credit Card?	○ Yes	◉ No

Amount:$ [   ]   Alternate Traveler: [   ]

In order for Travel Office to register the individual, this must be submitted 5 days prior to the registration deadline.

☐ Conference registration to be registered by Travel Office

If the above information is not checked or provided, then the individual traveler will be responsible for registering, paying for and submitting for reimbursement the conference registration fees.

If that button is not clicked – the registration will *NOT* be completed by the Travel Office.

Complete the rest of the form with transportation accommodations, hotel accommodations and any additional notes or explanations. *REMINDER:* There is a limited amount of characters in the notes section; it will cut off after 256 characters.

Transportation Information

Mode of Transportation:* ☐ Airplane ☐ Train ☐ Bus ☐ State Car ☐ N/A

☐ Rental Car ☐ Personal Car - Miles:* [   ]

Total Cost:$ [   ] (99999.99 Format)

Overnight Accomodations

** If Hotel Is Needed, You MUST Provide Name, Rate, Nights, and Per-Diem Rate Below. **

○ Yes ● No

Required Documents (In .PDF Format) Can Be Attached After Clicking The "Submit Form" Button

Other Notes And Explanations
(Maximum 256 Characters)

[   ]

In the notes section – if you are looking for the travel office to complete the registration, enter any usernames, passwords, links, etc one would need to successfully complete the registration. There also is an option in red to upload any additional information – upload registration forms, agendas, etc.

When all information has been put on the travel authorization, go ahead and hit submit.

[Submit Form] [Close]

The initial travel approval has been removed from this process. Once you hit submit the travel authorization will go directly to the department head for the account number entered. The department head is not always the employee's director or supervisor, it goes to whoever can sign off for the account number provided in the travel authorization.