Welcome

UF | IFAS Extension
UNIVERSITY of FLORIDA

2021 FLORIDA EXTENSION Business Professionals Virtual Conference

May 17-21, 2021

Connect • Grow • Shine

Your Extension Business Services Travel Specialist

- Elizabeth ‘Beth’ McLaughlin
- Expense Manager (Approver) for:

✓ In-Service Trainings (ISTs)
✓ Professional Development Mini-Grants
✓ Designated awards, Dean-funded travel support

Credo: “Do it right the first time” ☺

Travel & Expense – the Adventure Begins

Back to Basics

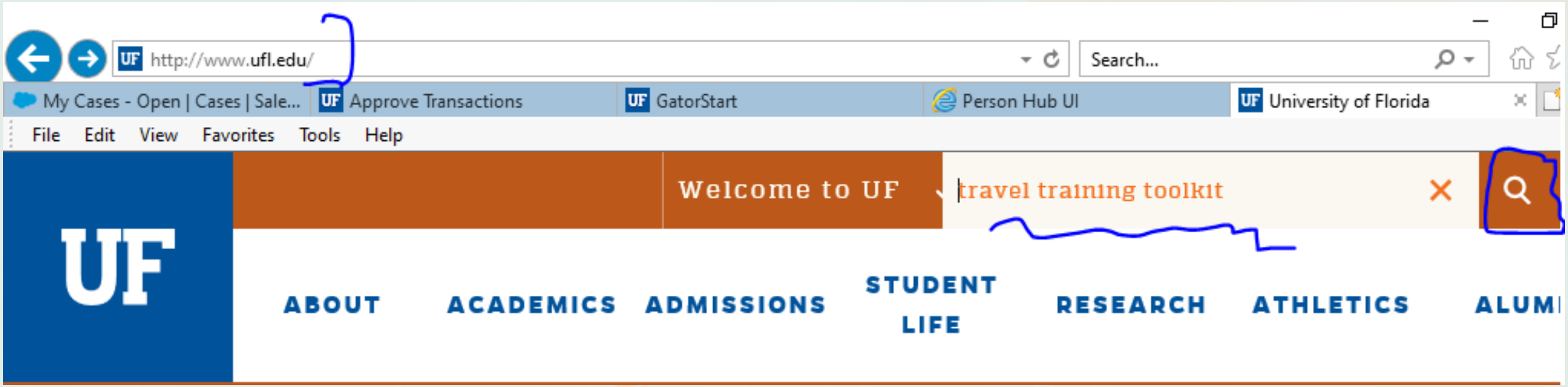
PST930 Travel Training,
Travel Authorizations
&
Expense Reports

In-Service Trainings
&
PDEC

Tips, Tricks, Pitfalls &
Hints

Future Travel
Upgrade(s)

Back to Basics
… but first, a word from our Sponsor

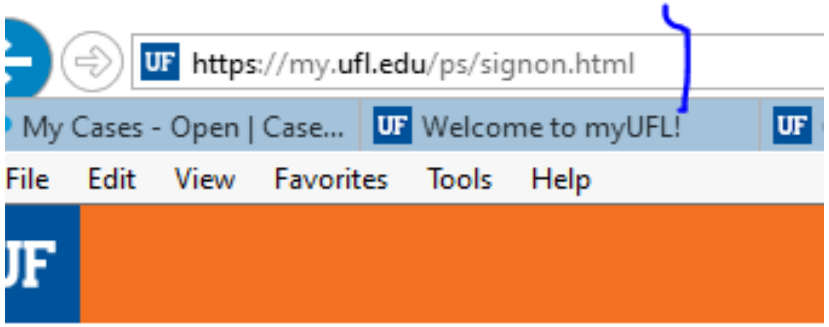


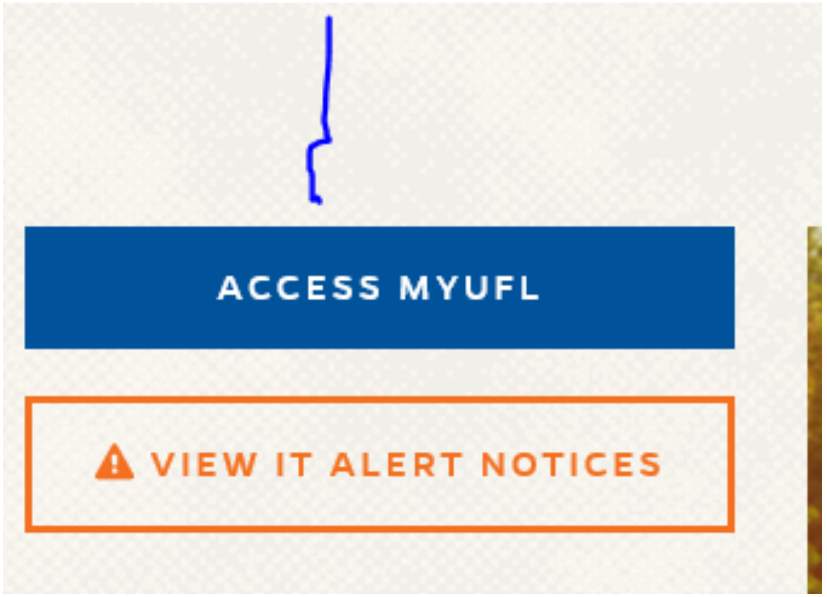
PST930 – Online Travel Training

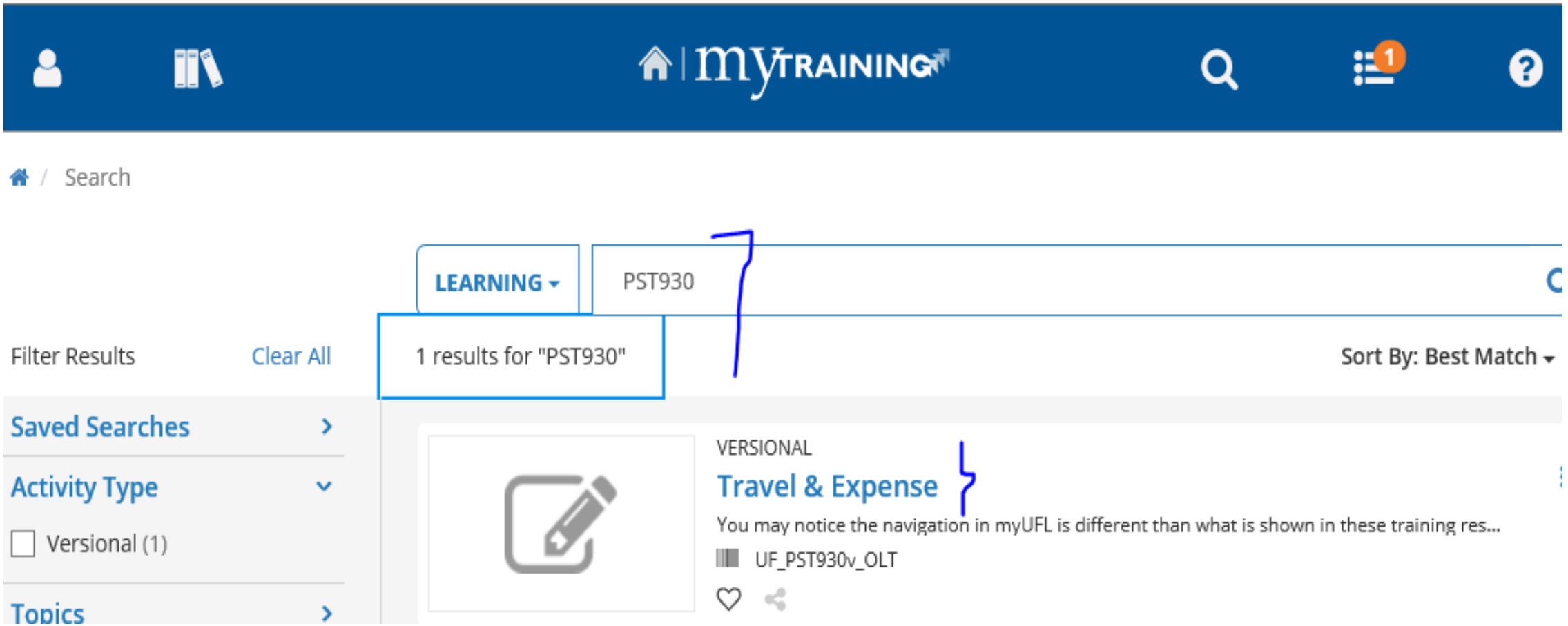
- Required to Designate a Travel Originator
- We'll send you the PST930 online Travel Training Link via email or MS Teams
- Allow 3-5 business days for Extension Business Services to initiate the process to obtain your travel Security Role
- Remember to search ufl.edu to obtain a Travel Tookit

Navigating to your Travel Training

- Login at 'Access myUFL'
- Type in Gatorlink Username & Password
- If you are a new employee, you will have to set this up first
- Click on 'My Self Service'
- Click on 'Training and Development'
- Click on 'My Training'



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PST930
Filter Results
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1 results for "PST930"
Sort By: Best Match
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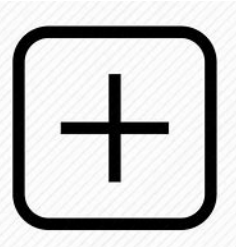
Travel & Expense
You may notice the navigation in myUFL is different than what is shown in these training res...
UF_PST930v_OLT

For Travel Originators who Input Travel – Examples of Reimbursement Eligibility

- In-Service Trainings (ISTs), Conferences, Other Meeting
- District travel supported by your DED or Professional Development Mini-Grants, approved by our office
- Travel Support utilizing your county 182 funds; approved by your CED
- Some ERs have multiple funding sources – Accounting Details, add a line approvers



Travel Authorizations aka TA's
Expense Reports aka ER's

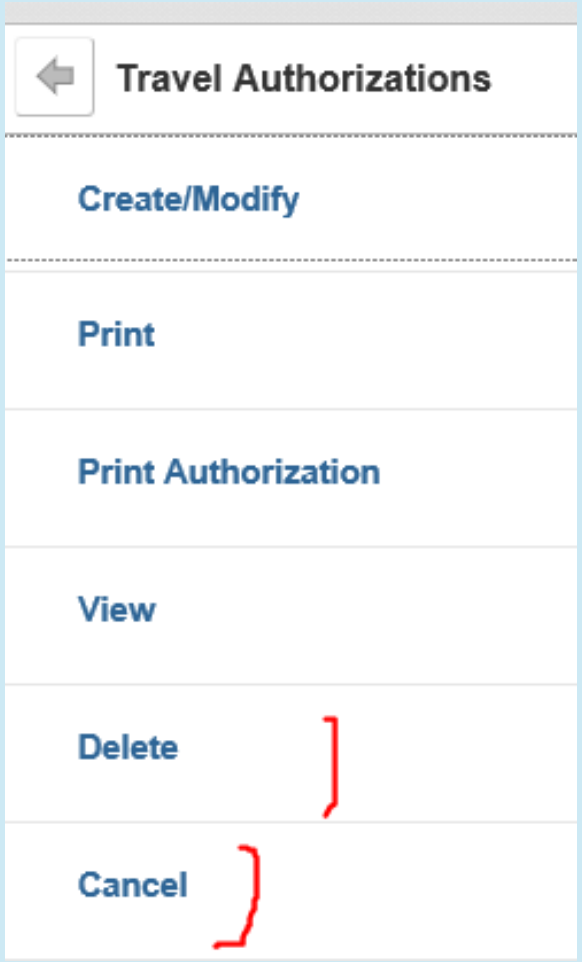
- **Travel Authorizations (TAs):**
  - Out-of-state > International > Conferences & Conventions > ISTs with a Reg Fee
  - Your CED and/or DED may have additional requirements
  - No TA or ER required for 'Virtual Conference' with only a Reg Fee, paid with a PCard
  - Just do PCard reconciliation & MAKE SURE YOU USE ACCOUNT CODE 715100
    - If there are any other additional travel expense reimbursement, an ER will be necessary
  - See 'UF Travel Directives' for Updates, COVID guidance, Pre-Travel Approvals, etc

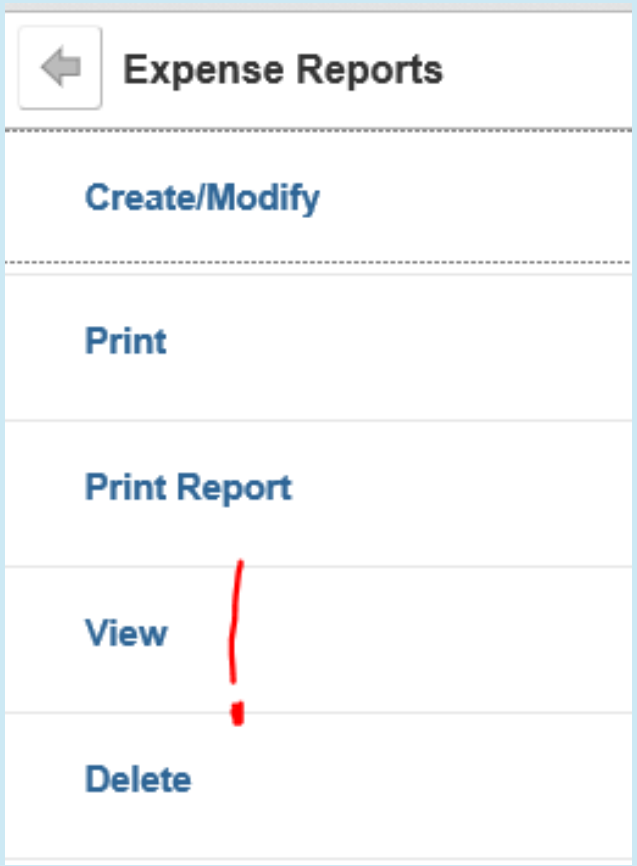
- TAs are not TAR’s travelers may need to submit both

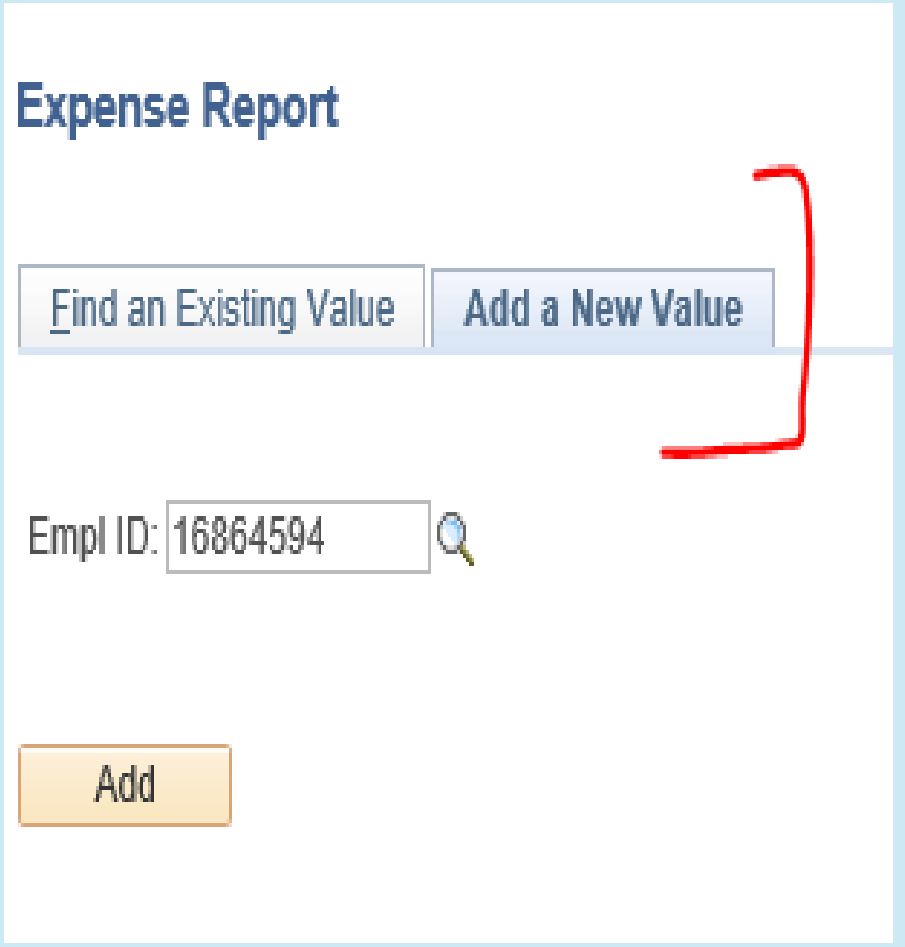
- A TA takes place in the myUFL Travel & Expense Portal

Navi -GATOR-ing to the Travel Portal

How to Create your ER from an Approved TA







PDEC & In-Service Trainings aka IST's

PDEC – Program Development & Evaluation Center

Characteristics of Herbicides: Understanding How Herbicides Work

Information-driven irrigation for saving water and improving production

School Gardening Basics and Beyond for UF/IFAS Extension Agents and UF/IFAS FNP professionals

Let's Make Some Black Gold: Extension's approach to composting education (and how to start in your community)

How to read sea level rise and climate change information

Invasive Species Training Module and Emerging Issues Webinars

Expanding Outreach with Entomology: Creating Educational, Engaging Youth, and Increasing Diagnostic Skills

Introducing Statewide Pesticide Safety (CORE) Training and Exam Updates

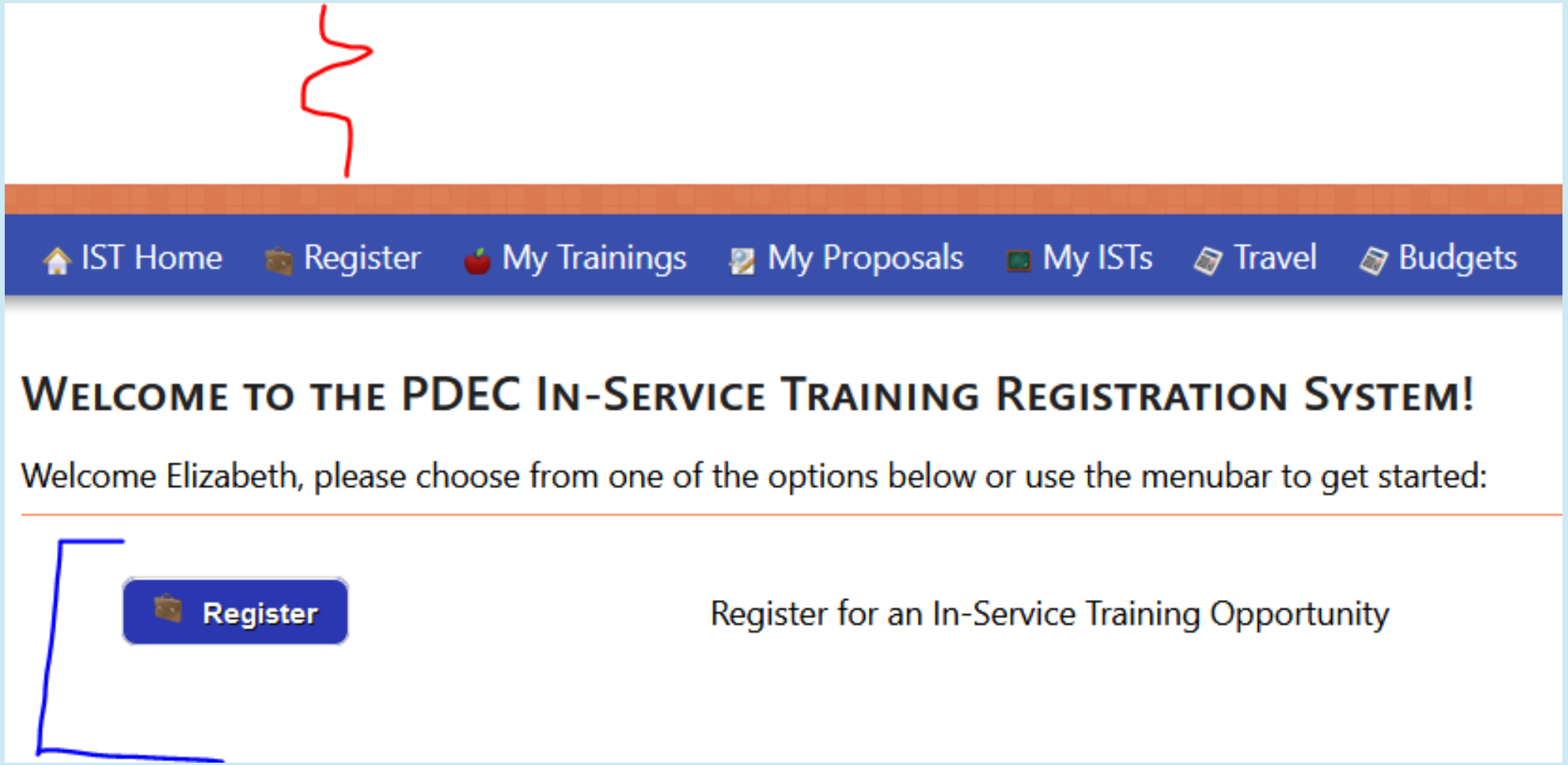
Elements of Healthy Aging.

Beef and Forage In-service Training: Tips and Tactics

Navigating Difference: Cultural Awareness

CED Foundations

Locate an IST # - Easy Breezy



To Sort by the IST

Click on the IST # hyperlink & they will sort in numeric order

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Program Development & Evaluation Center Applications Hub

IST Home | Register | My Trainings | My Proposals | My ISTs | Travel | Budgets

Current Training Opportunities

Below you will find a list of current training opportunities that are available for registration.

- Click on the IST number to view general information about a training.
- Click on the title name to download/view the agenda for the training.
- You may also click on the number of sessions to view individual session information.
- Click on the arrows above each column to sort the list by that column's values.
- By clicking on "Register", you may also see the list of people registered for an upcoming training.

Filter by initiative or program:
Use the drop-down menu below to filter available trainings by initiative, program, and funding source as desired. You may use multiple filters at the same time.

Initiative: All Program: All Funding Source: All

Filter trainings by title keywords, type, or date: (Filter list...)

IST #	Title	Sessions	Type	Start Date	End Date	
31995	Tea Crop Field Day (Virtual)	1	Distance	5/21/2021	5/21/2021	Register
31989	Elements of Healthy Aging.	4	Distance	6/8/2021	7/27/2021	Register
31969	Navigating Difference Training	1	Traditional	8/17/2021	8/19/2021	Register

Sort by Course Title, Alphabetically

IST #	Title	Sessions	Type
31904	Advances in Irrigation and Water Resources Management	5	Distanc
31917	Basics of Private Drinking Wells and Septic Systems	6	Distanc
31967	Beef and Forage In-service Training: Tips and Tactics	1	Mixed
31955	CED Foundations	4	Distanc

Sort by Start Date of the IST

Sessions	Type	Start Date	
1	Distance	6/30/2015	1
1	Distance	5/18/2020	5
3	Mixed	5/13/2021	5
11	Distance	5/13/2021	1
5	Traditional	5/14/2021	5

Tricks, Tips, Hiccups, Pitfalls

Post Trip Guidelines:

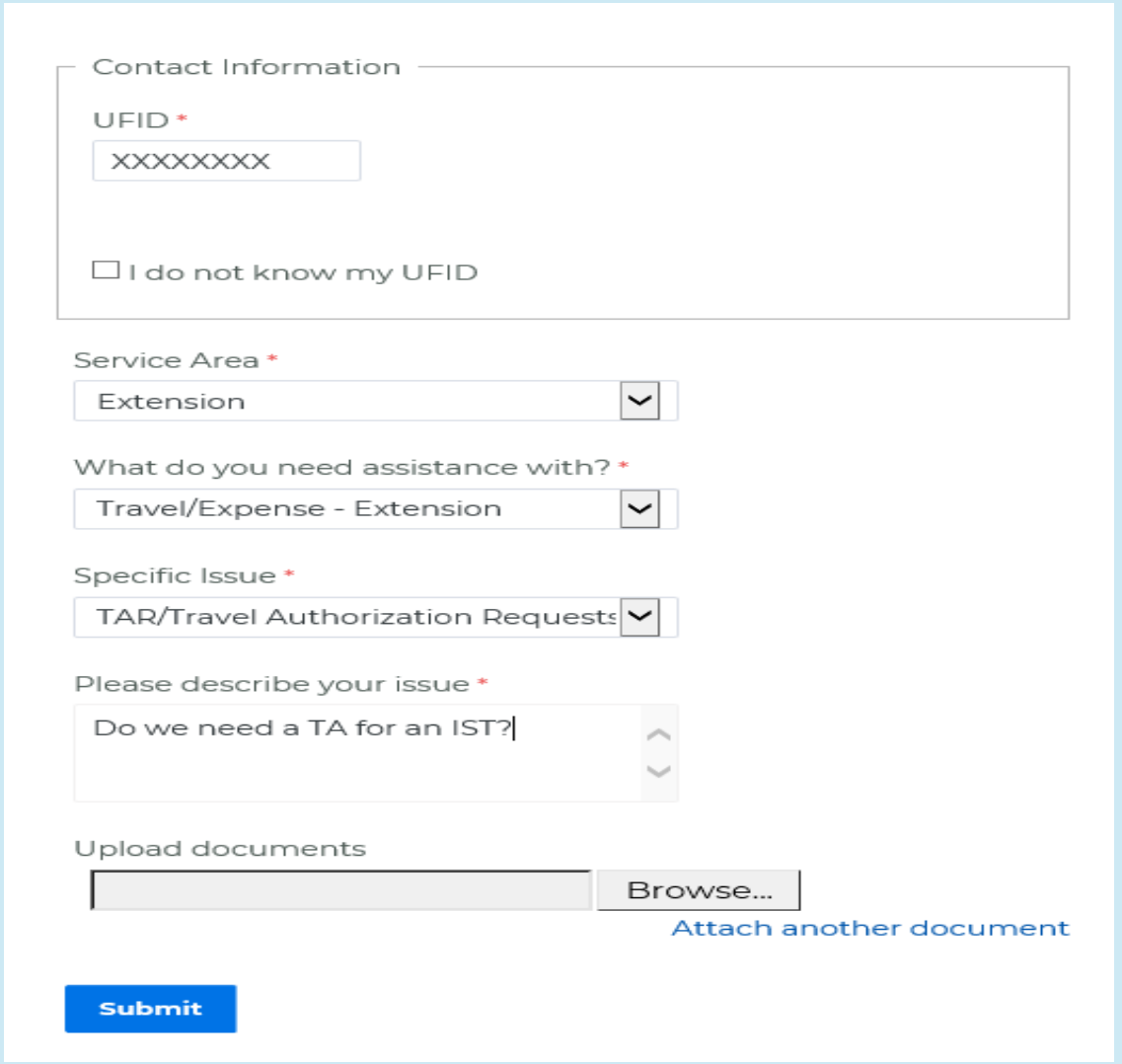
- Expense Report (ER) Please utilize Approved TAs are used to create ERs
- ERs created without a TA: provide an explanation in the ER 'Notes' hyperlink
- Use the correct ChartField for PCard charges; ChartFields should match the ER

Common Mistakes and Potential Delayed Reimbursement:

1. Not updating the ChartField from the default setting
2. Using incorrect meal allowances
3. Not separating expenses by date of event
4. Incorrectly selecting pre-paid or personal expenses
5. Not providing thorough supporting documentation
6. Remember the Attachments hyperlink has been de-activated
7. Use the Documents button to access OnBase to attach documents

Ticket System – Travel Assistance

Submit ticket via
https://uf.tfaforms.net/f/ifas



And a few more tidbits …

Open Encumbrances, Approved TAs not utilized to create ERs, Pending, etc

Travel Documents attached through OnBase, not the Attachments hyperlink !

ERs submitted 60+ Days after Trip End Date – reported to UF Travel – tax implication

Withdrawing an ER to make revisions, add supporting travel documents, etc

FL Senate Appropriations Committee Mandate for FY21 Base Lodging price of $225/night

We will let you know if that remains intact for FY22, ie 7/1/21

Travel Upgrade –the Future looks bright

- Unified Systems
- Airline Travel Comparisons at the time of booking
- OnBase vs Attachments
- One-Stop Shopping

Thank you for your QUALITY travel input ~

~ Asking proactive questions

Trouble~shooting & sharing with us~

~Connect, Grow & Shine … Together

FEBPC ~ Cooperative Extension at its Finest