Reviewing Travel Request Forms
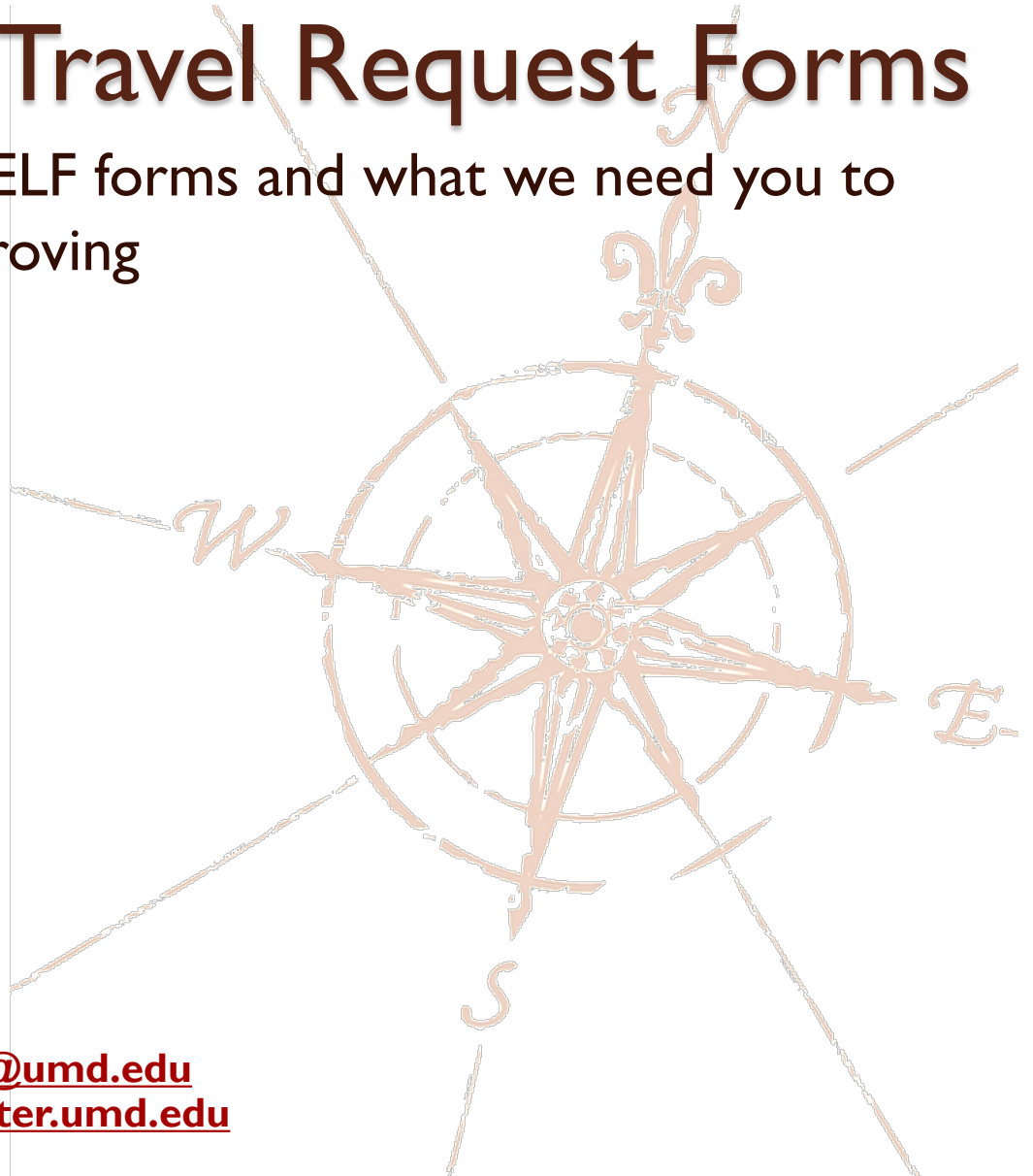
Tips to navigating ELF forms and what we need you to review before approving

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Travel Approval Requests (TAR)

✓ The Smart Center creates forms in ELF. We ask that the department or traveler visit the Smart Center website to complete our travel request [form](#).

✓ If the traveler's social security number is not provided on the request, the Smart Center will contact the department to confirm US citizenship. If the traveler is not a US citizen and they will be traveling to campus the department will be required to complete the foreign visitor screening through [ORAA](#) and receive approval before submitting the travel request.

✓ The department is responsible for ensuring compliance with the [Fly America Act](#) for all international travel paid using a federal grant. The traveler should inform the travel agency that their itinerary needs to follow Fly America requirements.

ELF Notifications

✓ Every time the Smart Center sends your office a travel approval request you will receive a system generated email letting you know to check your ELF box.

✓ If the Smart Center knows that the travel request needs approval the same day we will put a note in the description which will show up in the subject line of the email, for example: *ELF Form Travel Approval Request - A. Smith BSOS (ticket today).* Remember that all reservations booked through University contracted agencies auto-cancel Friday at 5pm so please review your ELF inbox frequently.

Important details

✓ Make sure that the traveler and funding account belongs to your department. If you believe the form was sent to you in error and there are no directions in the comments section, please contact the Smart Center at x58282. **Please do not reject the form.**

✓ If you know that the traveler is using one of the university travel agencies please make sure that the correct agency is selected.

✓ Confirm if the traveler is authorized to travel on the requested dates and that the destination, trip purpose, and account number are correct.

✓ If the account belongs to your department *but is incorrect* please change the account to the correct FRS *and* make a note in the comments section letting the Smart Center know of the change.

Important details (continued)

✓ Once the request has been approved the funds will be encumbered from the FRS listed on the TAR.

✓ The department is responsible for notifying the traveler of the TAR approval and budgeting details.

✓ If changes need to be made to the TAR after it has been approved please send the Smart Center an email at bsossmartcenter@umd.edu requesting the changes. The Smart Center cannot take changes over the phone.

✓ Employee instate travel expense statements that do not include lodging costs or travel card expenses are sent to the department for approval. Expense statements for domestic, foreign, and instate travel including lodging and/or travel card expenses are approved by the Dean's office once the department approves the TAR.

Financial details to verify

✓ Review the costs allotted to make sure that the total estimated does not exceed the department's limit (if there is one).

  ✓ If you receive a TAR and the amount listed is more than the budget for this trip please contact the Smart Center or reduce the total to match the limit – DO NOT approve with a higher total than allowable because **_the amount listed on the approved TAR will be encumbered_** . If there is a department limit please make a note in the comments section.

  ✓ If there is no limit noted in the comments section of the TAR the Smart Center will accept and reimburse the traveler for expenses *up to 10% above the approved amount on the TAR*. For example, if a TAR is approved for $1000 the Smart Center will allow the trip cost to add up to $1100 (including expenses paid on the travel cards) without contacting the department. The department can make a note on the expense statement submitted if they would like to modify the trip limit.

  ✓ If the traveler's expenses are more than 10% above the approved estimate or if a note has been added by the department to the submitted expense statement asking us to increase the limit the Smart Center will process an adjustment TAR to send for the department's approval.

Comments section

✓ Read the comments section to verify that the travel card notes are listed and correct. If there are no travel card notes then the Smart Center does not know that the traveler/department will be requesting an expense to be paid directly by the university. If you know that your department travel card or the Smart Center's travel card should be used please contact the Smart Center at x58282 before approving the form.

✓ If the travel is international on a grant the Smart Center will include a foreign travel note asking the department approver to attest that the expenses are allowable on the grant. This certification is the department's responsibility.

✓ Department chair travel requests – The department approver should type fiscal approval and send the form to Ann Holmes ___and___ Carolyn Schupbach for final ELF approval.

Final notes about the ELF system

✓ When exiting a form, make sure that you click the "Exit" button rather than just closing ELF. If you are in a form and close ELF before exiting a form, the form becomes locked so that no one else can approve or make changes until you log back on and correctly exit the form.

✓ The department is responsible for reviewing the ELF form and ensuring that the traveler, dates, destination, trip purpose, amount encumbered, and account number are all correct.