

# TRAVEL EXPENSE SYSTEM-TRAVELER USER GUIDE

1. The new system has been redesigned to offer the following conveniences:
  - a. Login through my apps and use your user id and password.
  - b. Simplify the system and improve usability.
  - c. View the status of all expense reports and exception requests, as well as payment information, in one place.
2. Go to [www.ncaa.org](http://www.ncaa.org) and click on My Apps.
3. Login using your SSO user id and password. If you do not have an SSO account through your school, please reach out to your on-campus SSO administrator.
4. To begin a new expense report, click on the Championships Travel tab and then click on the Create link.

The screenshot displays the NCAA Travel Expense system interface. At the top, there is a header with the NCAA logo and 'NCAA Travel Expense'. A navigation bar contains several tabs: 'Non-Staff Travel', 'TAN/STARS', and 'Championships Travel' (which is highlighted with a red arrow). Below this, a secondary navigation bar lists various options like 'Championships', 'Expense Reports', 'Exception Requests', etc. A 'Welcome, Melissa Piening' message is visible in the top right corner. The main content area shows a table of expense reports with columns for Championship, Round, Institution, Primary Exp Rpt - Amount, Primary Expense Status, Primary Expense - Date Submitted, Primary Expense Batch, Forgotten Exp Rpt - Amount, Forgotten Expense Status, Forgotten Expense - Date Submitted, Forgotten Expense Batch, Trip Edit, and Flagged For Review. The first row of the table is highlighted, and a red arrow points to the 'Create' link in the 'Primary Expense Status' column. Below the table, there is a 'Status Legend' box with the following information:

| Status Legend                      |  |
|------------------------------------|--|
| <b>Create:</b>                     | Expense Report has not yet been started.   |
| <b>In Progress:</b>                | Traveler is working on expense report.   |
| <b>Submitted - Being Reviewed:</b> | Expense report has been submitted and will be reviewed by the travel staff.  |
| <b>Approved:</b>                   | Expense report has been approved for payment but updates to traveler payment record are required (e.g. address, bank information, etc.). |
| <b>Approved - Payment Pending:</b> | Expense report is approved and will be submitted to accounting for payment by the next morning.  |
| <b>Submitted for payment:</b>      | Expense report is approved and has been submitted to accounting for payment.   |
| <b>Paid:</b>                       | Payment has been sent to traveler.   |
| <b>Nothing to pay:</b>             | Expense report has no items to pay.  |

5. On the Competition Site/Dates, verify the competition site and check the team competition dates. If not correct, select the site of competition from the dropdown menu and select the date/s of competition and then click Save.

The screenshot shows the top navigation bar with the NCAA logo and 'NCAA Travel Expense' text. A user welcome message 'Welcome, Melissa Piening' is visible in the top right, along with links for 'Manage Users', 'Change Password', 'Non-Staff User Guide', 'Championships', 'Mileage Calculator', 'Contact Us', and 'Logout'. Below the navigation bar, the page title is 'Alabama - 2016-17 DI Women's Soccer First Round'. A progress bar indicates the current step is 'Competition Site/Dates', with other steps being 'Travel Details', 'Hotel Information', and 'Final Calculations'. The 'Site' section has a dropdown menu set to 'Stanford - Boyd & Jill Smith Family Stadium'. The 'Team Competition Date(s)' section has radio buttons for dates from 10/10/16 to 10/14/16, with 10/13/16 (Thursday) selected. A green 'Save' button is at the bottom left.

6. Next click on Travel Details. The number of approved student athletes and non-student athletes will appear. If you took less than the approved number of travelers adjust the student athletes or non-student athletes number down.

The screenshot shows the 'Travel Details' step of the process. The 'Team Travel Party' section contains three input fields: 'Student athletes' with the value 22, 'Non student athletes' with the value 6, and 'Travelers' with the value 28. A red arrow points to the 'Student athletes' field. Below this, the 'Travel To Competition' section is active, showing 'Drive To Competition' selected. It includes a table with columns for 'Travel Date', 'Leaving From', 'Arriving At', and 'Distance'. The 'Leaving From' is 'Alabama' and 'Arriving At' is 'Stanford - Boyd & Jill Smith Family Stadium' with a distance of 2302.00. The 'Travel From Competition' section is also visible, showing 'Drive From Competition' selected, with 'Leaving From' as 'Stanford - Boyd & Jill Smith Family Stadium' and 'Arriving At' as 'Alabama' with a distance of 2300.00. A green 'Save' button is at the bottom left.

7. Travel to Competition and Travel from Competition: if your travel dates and times do not prepopulate, select “Fly To/From Competition” or “Drive To/From Competition” and then select the date, time and airports if applicable.

**NCAA Travel Expense** | Welcome, Melissa Piening | Manage Users | Change Password | Non-Staff User Guide | Championships | Mileage Calculator | Contact Us | Logout

Non-Staff Travel | TAN/STARS | Championships Travel

### Alabama - 2016-17 DI Women's Soccer First Round

Competition Site/Dates | Travel Details | Hotel Information | Final Calculations

**Team Travel Party**

Student athletes: 22  
Non student athletes: 6  
Travelers: 28

**Travel To Competition**

Fly To Competition  Drive To Competition

| Travel Date   | Leaving | Arriving At                                 | Distance |
|---|---------|---|----------|
| <input type="text"/> <input type="button" value="Select time"/> | Alabama | Stanford - Boyd & Jill Smith Family Stadium | 2302.00  |

**Travel From Competition**

Fly From Competition  Drive From Competition

| Travel Date   | Leaving From                                | Arriving At | Distance |
|---|---|-------------|----------|
| <input type="text"/> <input type="button" value="Select time"/> | Stanford - Boyd & Jill Smith Family Stadium | Alabama     | 2300.00  |

8. Click Save and then click on Hotel Information.

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Non-Staff Travel | TAN/STARS | Championships Travel

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**Team Travel Party**

Student athletes: 22  
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**Travel To Competition**

Fly To Competition  Drive To Competition

| Travel Date  | Leaving From | Arriving At                                 | Distance |
|--|--------------|---|----------|
| 10/10/2016 <input type="button" value="Select time"/> 5:00AM | Alabama      | Stanford - Boyd & Jill Smith Family Stadium | 2302.00  |

**Travel From Competition**

Fly From Competition  Drive From Competition

| Travel Date  | Leaving From                                | Arriving At | Distance |
|--|---|-------------|----------|
| 10/13/2016 <input type="button" value="Select time"/> 7:00PM | Stanford - Boyd & Jill Smith Family Stadium | Alabama     | 2300.00  |

- Once on the Hotel Information page: enter in the hotel room rate, number of rooms used each night, total number of student-athlete travelers, total number of non-athlete travelers, and number of student athletes per room. Lastly, select the hotel chain from the drop-down menu.

- Click Save and then click on Final Calculations.

- “Calculated Expenses” provides a summary of your expense report. If you need to add a miscellaneous expense for baggage fees, click the drop-down menu under Miscellaneous Expenses and select the type.

Championships Expense Reports Exception Requests Batch Payments Host Rules Travel Parties Exception Request Types High Cost Cities Airports Global Settings

Alabama - 2016-17 DI Women's Soccer First Round

Competition Site/Dates Travel Details Hotel Information Final Calculations

**Expense Report - In Progress**

Championship: 2016-17 DI Women's Soccer First Round  
 Institution: Alabama  
 Created by: Melissa Plening @11/04/16 16:18

**Calculated Expenses**

| Expense       | Travel Party | Exception Request | Travelers | Units | Rate     | Amount            | Approved |
|---------------|--------------|-------------------|-----------|-------|----------|-------------------|----------|
| Per Diem      | Team         |                   | 28        | 2.0   | \$150.00 | \$8,400.00        |          |
| <b>Total:</b> |              |                   |           |       |          | <b>\$8,400.00</b> |          |

**Miscellaneous Expenses**

Please be sure to total all expenses by type and enter one line only per type. For example, all reimbursable baggage fees should be totaled and entered on one line. Please do not attempt to enter them separately by traveler or by trip. Any detail required can be entered into the Notes field.

If an expense requires a receipt, the system will prompt you attach it. If you do not have that field available, no receipts are required and you do not need to submit them to us.

| Expense               | Unit | Amount | Receipt | Notes |
|-----------------------|------|--------|---------|-------|
| Select To Add Expense |      |        |         |       |

**Staff Notes**

Note Created by

Add

- Enter in the dollar amount and notes. If a receipt field appears you will need to upload your receipts. The receipts must be attached as a pdf document. Click Browse and upload the pdf.

Championships Expense Reports Exception Requests Batch Payments Host Rules Travel Parties Exception Request Types High Cost Cities Airports Global Settings

### Alabama - 2016-17 DI Women's Soccer First Round

✓ Competition Site/Dates
✓ Travel Details
✓ Hotel Information
Final Calculations

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| Expense | Unit  | Amount | Receipt              | Notes |
|---------|-------|--------|----------------------|-------|
| Baggage | 20000 |        | Browse... (pdf only) |       |

Select To Add Expense ▼

**Staff Notes**

Note Created by

**Update Expense report** **Submit** **Report** **Trips**

- Once your expense report is complete, click Submit.

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✓ Competition Site/Dates
✓ Travel Details
✓ Hotel Information
Final Calculations

**Expense Report - In Progress**

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| Expense | Unit  | Amount | Receipt              | Notes |
|---------|-------|--------|----------------------|-------|
| Baggage | 20000 |        | Browse... (pdf only) |       |

Select To Add Expense ▼

**Staff Notes**

Note Created by

**Add**

**Update Expense report** **Submit** **Report** **Trips**

14. If you need to request a travel exception this should be done prior to the championship. On the Championships Travel page, click Exception Request.

15. Select the sport from the drop-down menu.

**Exception Request**

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**= Exception Request for Alabama =**

Championship travel

Exception reason

Competition date   ...

*\*Travel policy pays: 0.0 day(s) before first competition date and 0.0 day(s) after last competition date.*

Depart time   ...

Additional days requested

Explanation

16. Complete the form with the exception reason, competition date, departure date and time and explanation.

17. If the exception is within policy, it will auto approve and you will see the status on the Championship Travel tab. If it is outside of policy, it will show as Review Required and you will be able to monitor the status on the Championship Travel tab.

18. If you have trouble using the system, please contact the travel department at [travel@ncaa.org](mailto:travel@ncaa.org) or 317-917-6757.