

# BLANKET TRAVEL AUTHORIZATION (BTA) EXPENSE


## Travel Quick Reference Guide

Updated July 8, 2024

### TRAVEL APPLICATION

#### Expense

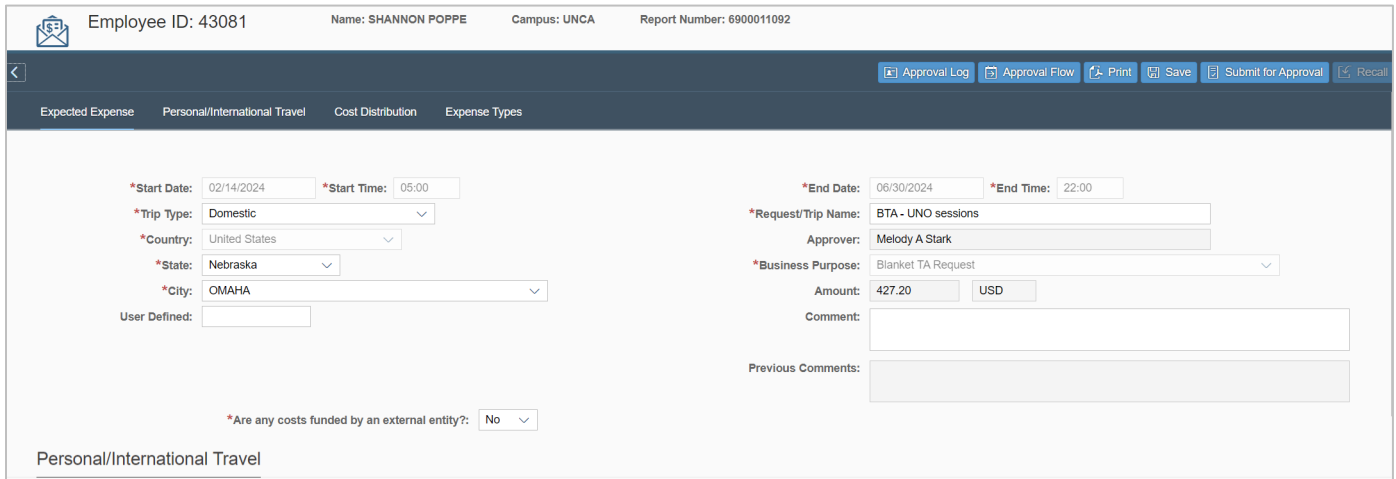
#### HELPFUL HINTS

 A Blanket Travel Authorization (BTA) report/report ID will be reused each time a traveler submits a new expense report. **Note: if an expense report has been submitted using a BTA, it must be sent for payment prior to the next use.**

- BTA's provides authorization with one approved travel request for trips with the *same business purpose*, which can consist of multiple trips throughout a fiscal year.
- BTA expense report can be created at any time during the calendar year; however, all BTA's expire at the end of the fiscal year (June 30).
- Travelers can have multiple BTA's.
- BTA's are generally used for mileage and meals, however depending on the circumstances of the trip, a BTA may contain lodging.
- A BTA can consist of any combination of travel within city limits, a 100-mile radius of the Traveler's respective campus (or assigned work location), and/or State limits.

### PROCEDURE

From the expense application, click on the approved BTA travel request. The report opens to the expense header and displays the expense types entered in the BTA travel request.



The screenshot shows the expense application header form. At the top, it displays Employee ID: 43081, Name: SHANNON POPPE, Campus: UNCA, and Report Number: 6900011092. Below this is a navigation bar with tabs: Expected Expense, Personal/International Travel, Cost Distribution, and Expense Types. The main form area contains several fields: Start Date (02/14/2024), Start Time (05:00), End Date (06/30/2024), End Time (22:00), Trip Type (Domestic), Country (United States), State (Nebraska), City (OMAHA), Request/Trip Name (BTA - UNO sessions), Approver (Melody A Stark), Business Purpose (Blanket TA Request), Amount (427.20), and Currency (USD). There are also buttons for Approval Log, Approval Flow, Print, Save, Submit for Approval, and Recall. A section for Previous Comments is visible at the bottom.


Several fields on the expense header are greyed out (start date/time, end date/time, and business purpose). All entries on the BTA will be entered per expense line.



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Click on expense type to edit and attach a receipt (if applicable). Expense types can be removed by checking the left-hand box and clicking .


Expense Types





<input type="checkbox"/>	Transaction Date	Expense Type	City	Travel Request Amount	Entered Amount	Amount	Status	
<input type="checkbox"/>		Mileage/Personal Car	OMAHA	USD 0.00	USD 136.00	USD 136.00	To Be Approved	>
<input type="checkbox"/>		Meals (Per Diem)	OMAHA	USD 0.00	USD 291.20	USD 291.20	To Be Approved	>

To add additional expenses, click . Select the expense type from the dropdown menu. Attach a receipt if required by clicking . *Note:* receipts can be PDF or image files; attachment name cannot include special characters.



Save

Cancel

Expected Expense

Cost Distribution

Attachments

\*Expense Type:

Cost Distribution

Distribution

Cost Object Type

Cost Object

Description

100

Cost Center

9145100600

NEBIS ADMINISTRATION

Attachments

Document Class

Title


Date created



File Size (MB)

No data

Add individual expense types. The BTA will allow both Meals per Diem and Meals One Day Trip expense types.

Expense Types





<input type="checkbox"/>	Transaction Date	Expense Type	City	Travel Request Amount	Entered Amount	Amount	Status	
<input type="checkbox"/>	02/18/2024	Meals (Per Diem)	OMAHA	USD 0.00	USD 67.20	USD 67.20	To Be Approved	>
<input type="checkbox"/>	02/16/2024	Mileage/Personal Car	OMAHA	USD 0.00	USD 43.86	USD 43.86	To Be Approved	>
<input type="checkbox"/>	02/16/2024	Meals-One Day Trip	OMAHA	USD 0.00	USD 25.20	USD 25.20	To Be Approved	>

## Save expense report

When the expense entries have been entered/edited, it is recommended to [save](#) the expense report before other action is taken. This will allow the *approval flow* to update from the travel request approvals to expense approvals.

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Approval Log Approval Flow Print Save Submit for Approval Recall

Expected Expense Personal/International Travel Cost Distribution Expense Types

\*Start Date: 02/14/2024 \*Start Time: 05:00 \*End Date: 06/30/2024 \*End Time: 22:00

\*Trip Type: Domestic \*Request/Trip Name: BTA - UNO sessions

\*Country: United States Approver: Melody A Stark

\*State: Nebraska \*Business Purpose: Blanket TA Request

\*City: OMAHA Amount: 232.00 USD

Once saved, a confirmation window appears. Click **Ok**.

The expense report status is now displayed as *Open*. Click anywhere on the expense row to review the report.

Employee ID: 43081 Delegate Name: SHANNON POPPE Campus: UNCA

All Open Submitted Approved Sent for Payment

Search

Report ID	Report Name	Business Purpose	Request Date	Status	Total Amount
6900011094	BTA - Chadron sessions	Blanket TA Request	02/01/2024	Approved Request	408.00 USD
6900011093	BTA - Kearney sessions	Blanket TA Request	02/01/2024	Open	154.44 USD
6900011092	BTA - UNO sessions	Blanket TA Request	02/14/2024	Open	149.86 USD
6900011067	Madrid - testing personal/companion	Business Trip	09/04/2024	Approved Request	3300.00 USD

Click **Submit for Approval**. A confirmation statement appears. Click **Accept & Submit**.

USER ELECTRONIC CONFIRMATION

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the University of Nebraska or the Nebraska State College System and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the University of Nebraska or the Nebraska State College System in full for those expenses.


Cancel Accept & Submit




A confirmation message appears. The status of the report changes to *Submitted*.

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Once the expense reimbursement has been approved by Payment Services and sent for payment, the status will change to *Payment Processed*. Within the expense report, the expense type line items will display *Posted* ✓ status and  (green bar) will appear to the left of the transaction date.

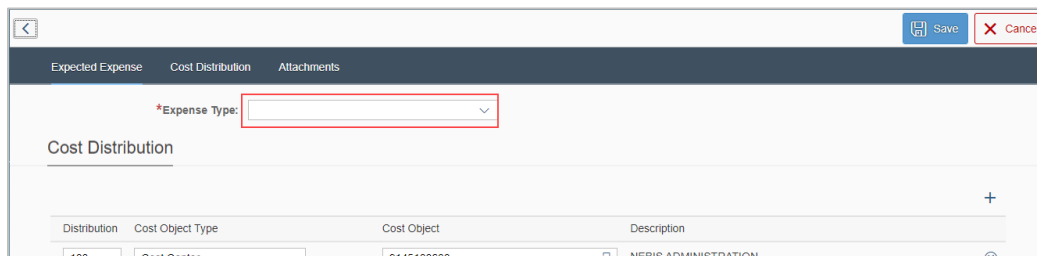
Expense Types							
  							
<input type="checkbox"/> Transaction Date	Expense Type	City	Travel Request Amount	Entered Amount	Amount	Status	
<input type="checkbox"/> 02/18/2024	Meals (Per Diem)	OMAHA	USD 0.00	USD 67.20	USD 67.20	Posted ✓	>
<input type="checkbox"/> 02/18/2024	Mileage/Personal Car		USD 0.00	USD 44.88	USD 44.88	Posted ✓	>
<input type="checkbox"/> 02/16/2024	Mileage/Personal Car	OMAHA	USD 136.00	USD 43.86	USD 43.86	Posted ✓	>
<input type="checkbox"/> 02/16/2024	Meals-One Day Trip	OMAHA	USD 0.00	USD 25.20	USD 25.20	Posted ✓	>

### SUBMIT ANOTHER EXPENSE REPORT






**Note:** if an expense report has been submitted using this BTA, the report status must be *Payment Processed* and the expense lines must show as 'Posted' prior to the next use.

From the expense application, open the BTA. **Do not recall the report.** To add additional expenses, click . Select the expense type from the dropdown menu. Update the cost distribution if needed and add receipts where required.



Distribution	Cost Object Type	Cost Object	Description
100	Cost Center	044500000	NEBRIS ADMINISTRATION


Continue adding expense types as needed. Both new and posted expenses will appear, with the current expense lines at the top.

Expense Types							
  							
<input type="checkbox"/> Transaction Date	Expense Type	City	Travel Request Amount	Entered Amount	Amount	Status	
<input type="checkbox"/> 02/20/2024	Mileage/Personal Car		USD 0.00	USD 43.52	USD 43.52	To Be Approved	>
<input type="checkbox"/> 02/20/2024	Meals-One Day Trip	OMAHA	USD 0.00	USD 7.34	USD 7.34	To Be Approved	>
<input type="checkbox"/> 02/18/2024	Meals (Per Diem)	OMAHA	USD 0.00	USD 67.20	USD 67.20	Posted ✓	>
<input type="checkbox"/> 02/18/2024	Mileage/Personal Car		USD 0.00	USD 44.88	USD 44.88	Posted ✓	>
<input type="checkbox"/> 02/16/2024	Mileage/Personal Car	OMAHA	USD 136.00	USD 43.86	USD 43.86	Posted ✓	>
<input type="checkbox"/> 02/16/2024	Meals-One Day Trip	OMAHA	USD 0.00	USD 25.20	USD 25.20	Posted ✓	>

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Once the new expenses are entered, click **Save**. A pop-up message appears. Click **Yes**.

 Confirm


This expense report has already been posted. Do you want to add to the expense report?

Yes

No

A save confirmation message appears.


☒ Messages

 Changes in posting past trigger adjustment postings

☒ Expense report 6900011092 was saved

Ok

The expense report is reset to *Open* status. Click to open and submit the expense report.

 Employee ID: 43081 

Delegate

 Name: SHANNON POPPE Campus: UNCA



All

Open


Submitted

Approved

Sent for Payment



Search



<input type="checkbox"/>	Report ID	Report Name	Business Purpose	Request Date	Status
<input type="checkbox"/>	6900011094	BTA - Chadron sessions	Blanket TA Request	02/01/2024	Approved Request
<input type="checkbox"/>	6900011093	BTA - Kearney sessions	Blanket TA Request	02/01/2024	Open
<input type="checkbox"/>	6900011092	BTA - UNO sessions	Blanket TA Request	02/14/2024	Open
<input type="checkbox"/>	6900011067	Madrid - testing personal/companion	Business Trip	09/04/2024	Approved Request

The expense report status is now *Submitted*. Note: the *Total Amount* shown will be accumulative of all expenses on this BTA.



All

Open


Submitted


Approved

Sent for Payment



Search



 Cancel

<input type="checkbox"/>	Report ID	Report Name	Business Purpose	Request Date	Status	Total Amount	
<input type="checkbox"/>	6900011093	BTA - Kearney sessions	Blanket TA Request	02/01/2024	Open	154.44 USD	>
<input type="checkbox"/>	6900011092	BTA - UNO sessions	Blanket TA Request	02/14/2024	Submitted	232.00 USD	>