TARs Submission & Formatting Guideline (9 pages)

Dear Awardee,

Congratulations on getting your travel grant award!

Please review this guideline before submitting your Travel Action Request (TAR). All awardees must carefully read and follow the instructions detailed in this document to submit a correct TAR. Additionally, there is a template herein on page seven, which every awardee must use when creating their TARs. Failure to adhere to the rules and format of the TARs (based on the instructions and the template provided) will result in the **denial of your TAR** regardless of your awarded grant.

Please read the instructions carefully before proceeding to the template.

How to Start a TAR:

1. Go to http://www.docutraq.sg.ufl.edu/ and click on *"Access Docutraq."* You may be prompted to log in using your Gatorlink credentials.
2. The whole process of a TAR submission only takes about 10-15 minutes. Please note that If you stay idle on the website for longer than 5 minutes, you will automatically be logged out and may have to start over again.
3. For the field *"Organization,"* please select ***"Graduate Student Council"*** or type the full name without quotation marks: Graduate Student Council
   Please check the dictation and probable typos.
   Please note: **DO NOT** select similar names such as Grad Student Council or other versions.
4. The Password for Login is: gscsarsubmit1415
5. After you log in to the dashboard, click on *"Create a new SAR/TAR"*

Dashboard: Graduate Student Council

| Total Requests	Pending Requests
0	0
+ Create A New SAR/TAR	View All Requests

6. On the next page, for the type of request, select Travel (option with a luggage icon)

Select a Type of Request

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a TAR (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is procured under the "Goods and Services" section of the Docutraq system.

🧺	🧳
Goods and Services	Travel
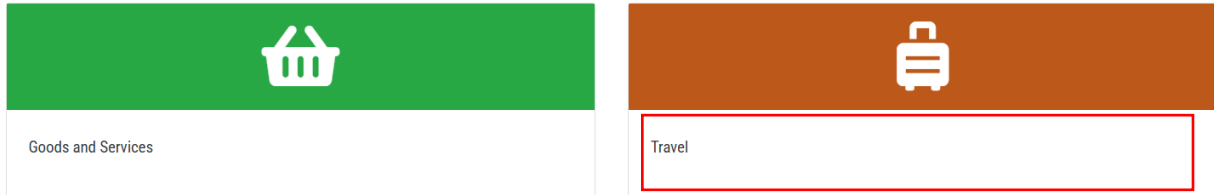
7. After reading all the terms and policies in the menu, select "Get Started"
8. On this page, you need to fill out the Basic Information based on the following:

   a. For **TAR Title**: Travel Grant – [applicant's last name, first name] (example: Travel Grant Doe, John)

   b. In **contact name**: type the your first and last name

   c. In **email**: type the your UFL email address (this email address will be used by Student Government Finance to update you on your TAR's status)

   d. In **Contact Phone**: type your daytime phone number

   e. In the **Budgeted Travel Number** dropdown menu: Select "1 – Travel Grants"

9. On the next page, fill out the **Vendor's Information** based on the following:

   a. If you already have a vendor profile in Docutraq, you may use your profile if all information is correct. If your address has changed, enter a new profile.

   b. If you don't have a vendor profile in Docutraq select *"Add new vendor:"*

      i. In **Name**: Type your full name

      ii. In **Address**: Type your current address (permanent OR local) and fill out city and state. *(This address may be used only in case of receiving a paper check for reimbursement)*

      iii. In **Email**: type your **UFL** email (if you use other email addresses, your TAR will be **denied**)

      iv. In **UFID**: type your UFID

   c. For the highlighted part (**is your listed vendor a UF Employee?**) select yes.

10. On the next page, you will fill out the **Travel Form** based on the following:

a. In **Number of Travelers**: type 1 *(regardless of how many people are traveling with you, keep this value at 1)*

b. In Departure Date: type your ticket date (if using public transport) or your travel start date **(This date should be consistent with the date on your grant application form)**

c. In Return Date: type your ticket date (if using public transport) or your travel return date **(This date should be consistent with the date on your grant application form—read item (d.) below)**

d. Your trip Departure and Return dates can differ from the event dates but not more than **TWO DAYS**. Exceptions should be discussed immediately with the treasurer before submitting the TAR so that GSC can assist you with the date difference. (e.g., long layovers, remote destinations, etc.)

e. Lodging (e.g., hotel nights) cannot be more than **ONE DAY** after the event's end date.

f. Only check the box if you are traveling internationally (outside of the United States).

g. In **Purpose of Trip**: type the full name of the event (conference/professional development event) with the year at the end

h. In **Destination**:

    i. For travels within the U.S., type [city],[state] (e.g., Gainesville, FL)

    ii. For international travels, type [city], [country] (e.g., Paris, France) (please note: contact UF international center for travel registration; strongly recommended)
        Refer to: This link

i. For **Benefit to UF**:

    i. If the event is a conference: type "To present research/scholarly work at the _____. Upon returning, I plan to share this research/scholarly work with the UF community by posting the research abstract and conference notes on the GSC Website for the UF student body as a

whole to review."

In the blank, type <u>THE FULL NAME OF THE EVENT/CONFERENCE</u> and the <u>YEAR</u>. Do NOT use abbreviations.

ii. If the the event is Professional Development: type "Upon returning, I intend to write a brief synopsis of the research, professional techniques, training, or instructions I received during the course of the event related to the field or industry of my studies and post them on the GSC Interdisciplinary Website to share with the University of Florida student body as a whole."

11. On the next page, you must add items to your travel based on the template provided in this document (page 7). Please complete this section accurately and according to the template. Please note that you must add and list **ALL** the items and their costs for your travel <u>regardless</u> of being reimbursed by SG or other funding sources.
For each added item in your TAR, simply copy ONLY the RED content between the lines and paste it into the item's "Description" box. DO NOT copy the item's title (Flights, Rental Cars, etc.). For selectable items, type X in brackets for your selection.

12. If any of the items are being covered by other sources of funding, please type **"(FUNDED)"** at the bottom of the item's description.

13. Please ignore the **"Pay Up To"** field. This will be handled by GSC.

14. After listing all the items, you will review all the information on the next page.

15. If all the information is correct, click submit and write down your TAR number. You may print (or save as a PDF) the submitted TAR. (It is strongly recommended that you print or save the entire submitted TAR for your records)

16. After the GSC President and Treasurer approve the TAR, it will be sent to Student Body Treasurer and SG Finance. Approval of your TAR by GSC **DOES NOT** mean that your TAR is fully approved. Student Body Treasurer and SG Finance should also review and confirm your TAR for full approval.

17. Please note that GSC will no longer be involved with the reimbursement process or your TAR status after the TAR's approval. For any inquiries, you must contact SG Finance:

    Email: sgfdocuments@sg.ufl.edu- Phone: (352)-273-4441

    Office hours for receipt delivery are: Mon-Fri, 8 am - 12pm, and 1 pm - 4 pm

18. If your TAR is **denied**, you will have 24 hours to resubmit (only two attempts are allowed).

19. You will receive a notification if your TAR is either denied by GSC or approved by SG Finance.

20. If you have a UF GO Profile, please **DO NOT** create a Travel Request or Expense Report. SG Finance will take care of that on your behalf. You will be sent instructions to add their team as Delegates to your profile.

21. To get your reimbursement, you should use SG Finance Instructions. **DO NOT** send your receipts to GSC officers. GSC is not responsible for your reimbursement process.

Please do not hesitate to contact the GSC Treasurer if you have any questions or concerns before submitting your TAR.

GSC Treasurer, Ali Mahmoudi (alimahmoudi@ufl.edu)

Thank you, and safe travels!

Amendments:

  i. If you are using rail transportation (e.g., Amtrak), inform the GSC Treasurer for approval for special items.

  ii. As of September 2024, SG Finance has started accepting Pcard and AirCards. Please note that you must have your TAR number in your report for the reference.

Transportation:

Airline: (If your return flight is different, copy the "Return Flight" section as well)

Airline Name: Spirit

Trip type: One way [   ] / Roundtrip [   ]

Outbound / Roundtrip Flight:

Departure Airport:

Destination Airport:

Cost: $

Return Flight:

RF_Departure Airport:

RF_Destination Airport:

RF_Cost: $

Rental Cars: (Van / Compact / Intermediate only; Luxury Cars and SUVs are not acceptable)

Distance (Miles):

Type of car:

Starting Point:

Destination:

Gas Included: [   ]

Cost: $

Fuel: (If applicable, type the estimated fuel amount)

Gallons / Tanks:

Cost: $

Cab Fare: (bus or carpooling should be filled using this item)

Reason(s):

Location: —From:

To:

Cost: $

Other Items:

Accommodations (Lodging): (Lodging type: Hotel, Hostel, Inn, etc.)

Lodging Type:

Hospitality provider name:

Number of nights staying:

Cost per night:

Total Cost: $

Registration: ("Registration Type" is early, regular, late, etc.)

Event Name:

Registration Type:

Cost: $

Baggage:

Number of Luggage:

Estimated Weight:

Cost: $

Parking:

Estimated Hours:

Cost: $

Tolls: (Information on tolls can be found on toll calculators; For "Number of poll points during trip," leave empty if it is unknown)

Number of poll points during the trip:

Highway Name:

Cost: $