

BLANKET TRAVEL AUTHORIZATION (BTA) EXPENSE

Updated February 22, 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, however depending on the circumstances of the trip, a BTA may contain lodging and meals.
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.

Employee ID: 43081 Name: SHANNON POPPE Campus: UNCA Report Number: 6900011092
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: 427.20 USD
User Defined: Comment:
Previous Comments:
Are any costs funded by an external entity?: No
Personal/International Travel



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						
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						
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 item(s) will display *Posted* ✓ status and | (green bar) will appear to the left of the transaction date.

Expense Types							
Transaction Date	Expense Type	City	Travel Request Amount	Entered Amount	Amount	Status	
02/18/2024	Meals (Per Diem)	OMAHA	USD 0.00	USD 67.20	USD 67.20	Posted ✓	>
02/18/2024	Mileage/Personal Car		USD 0.00	USD 44.88	USD 44.88	Posted ✓	>
02/16/2024	Mileage/Personal Car	OMAHA	USD 136.00	USD 43.86	USD 43.86	Posted ✓	>
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 status must be *Payment Processed* prior to the next use.

From the expense application, open the BTA. Add additional expenses, click **+**. Select the expense type from the dropdown menu. Update the cost distribution if needed and add receipts where required.

The screenshot shows a web interface for adding an expense. At the top right are 'Save' and 'Cancel' buttons. Below is a tabbed interface with 'Expected Expense', 'Cost Distribution', and 'Attachments'. The 'Cost Distribution' tab is active, showing a dropdown menu for '*Expense Type:'. Below the dropdown is a table with columns: Distribution, Cost Object Type, Cost Object, and Description. The table contains one row with values: 100, Cost Center, 0145100600, and NEBIS ADMINISTRATION.

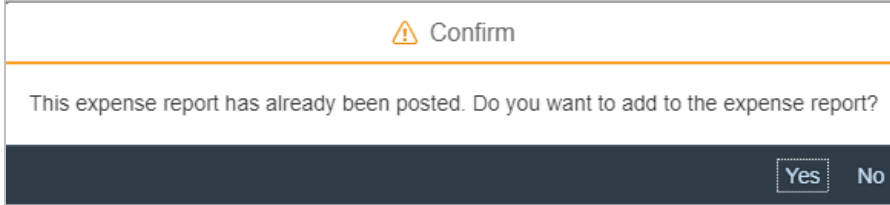
Continue adding expense types as needed. Both new and posted expenses will appear, with the current expense lines at the top.

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

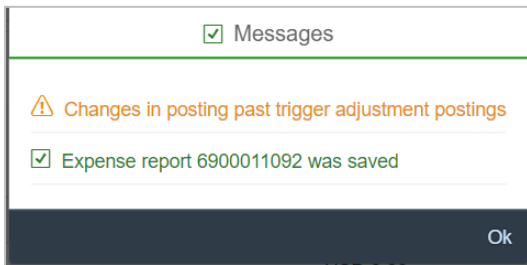
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Once the new expenses are entered, click Save. A pop-up message appears. Click Yes.



A save confirmation message appears.



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 >