Travel & Misc. Expense Authorization (TMEA) Form

Training Document

Once an individual has determined they will need to incur an expense (either for travel OR non-travel purposes) for which they intend to be reimbursed, they will need to log in to the Travel & Miscellaneous Expense Authorization (TMEA) Form to initiate the appropriate approval process.

The link for the TMEA Form may be found on the UWM Shared Services Travel/Procurement website (http://www.uwm.edu/shared-services/travel-ereimbursement).

Individuals will be required to provide UWM credentials to access the TMEA Form. Individuals not currently employed by UWM (e.g. volunteers, job applicants, students) would need to have a TMEA form processed on their behalf by an appropriate UWM-affiliated individual.

Once an individual has provided authentication, they will land on their appropriate home page. Individuals will have several small templates accessible on their home page which will provide information about items that need their attention (Task List, lower right) and their items which are currently in progress (lower left):
By clicking on the User Profile tab, individuals can also find a history of all previous TMEA Form requests:

These items are also accessible in full-page format by selecting them on the main navigation bar:

To begin a New Travel/Expense Authorization, individuals should select the appropriate tab on the main navigation bar:
Clicking on the tab will open the actual TMEA Form in a new browser window:

All items identified with a Bold Red/Maroon mark on the border are required fields that must be completed before a TMEA Form can be submitted for approval.

Individuals should:

- Select their name in the searchable Traveler/Purchaser Name field
- Select their School/College/Division (drop down menu)
- Provide the purpose of expense travel (drop down menu)
- Date of expense OR departure/return dates for travel expense
- Travel destination OR expense information (what is being purchased)
- Title of Event/Conference/Research/Trip (field NOT required for non-travel expenditure)
- Name of supervisor
Once this information is completed, individuals should select the expense type (type of travel OR non-travel) AND the frequency of the expense/travel (one-time or recurring):

**Expense Type:**

**Expense Frequency:**

Similar to previous authorization forms, the TMEA Form requests that expenses be identified in four general categories: Lodging, Transportation, Registration, and Other. All non-travel expense requests should provide additional expense information in the Other category. *Individuals should be certain to provide reasonable estimates for any expenditures.* E-Reimbursement requests that exceed the approved estimated costs may be delayed as additional written approval would be necessary from unit leadership.
Individuals who will be requesting reimbursement through the e-Reimbursement module must select the ‘Requesting’ radio button:

**Funds:**  
- Requesting  
- Foundation  
- No Funding / Reimbursement Requested

If there is a spending cap for reimbursement, the expense maximum funding limit should be noted:

**Funding Limit (if applicable):**

Once the “requesting” button is selected, the Funding Allocation portion of the TMEA Form is functional. Working left to right, individuals should select the School/College/Division that is **funding** the travel/expense. The Department drop-down populates based upon the division selected. Individuals should then select the appropriate department. If individuals should also complete the Fund, Program, Project/Grant (if applicable) sections if they know the appropriate funding string. These may be left blank for business office completion later in the approval process.

![Funding Allocation Screen](image-url)
Individuals should then but the reimbursement amount in the Amount column. PLEASE NOTE, the amount in the funding allocation column must total the amount in the estimated cost column before an individual can submit.

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
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<td></td>
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</tbody>
</table>

To add additional lines for funding splits between multiple units, individuals should select the “Add and Allocation” and add as many lines as needed. Again, the funding allocated amount across all funding sources should total the estimated cost column from earlier in the TMEA Form. Funding can also be allocated by percentages and the actual dollar amounts will be calculated automatically.

Those submitting the TMEA Form for travel reimbursement should select the appropriate checkboxes and complete the additional justification text box with any additional information required by their specific unit:

Check all that apply:

- This travel is essential and necessary to perform my duties.
- There are no alternative sites closer to UWM that would result in lower travel costs.
- Unable to postpone or cancel this trip.
- It is necessary for more than one employee to travel to the event.
- Unable to accomplish this business through other means.
- I am a conference presenter or panelist.

Please list other reason(s) for travel / expenditure:
Any pertinent documentation can be uploaded to accompany the TMEA Form and provide additional context/content to those approving the expense request:

**Attachments**

*Please Attach Documentation (conference agenda, registration form, purchase quote, trip justification, etc.)*

[Upload Supporting Documents]

Once complete, individuals then select “Submit” to route the TMEA Form for the appropriate approvals. Individuals can also choose to close the form without saving, save the form and close (in order to return and finish completion at a later date), and print the form.

[Submit]  [Close Without Saving]  [Save and Close]  [Print Form]

Following submission, the TMEA routes for approvals, first to the supervisor of record who will receive an email prompt to login and review/approve the request:

```plaintext
From: [Redacted]

Subject: Supervisor Review and Approve - TE19-02-00022

You have received this message because you have been assigned a task in the Travel and Miscellaneous Expense Authorization process.

Supervisor Review and Approve: Please review this request, make any adjustments as required and indicate your determination. To approve the request without adjustments, click the Approve button. To approve the request with adjustments, provide comments on your adjustments and click the Alter / Qualify button. To reject this request, provide comments describing your reasons and click the Deny button.

You may [click here] to open the form related to this task.

Request Number:  TE19-02-00022
Process Status:  Supervisor Review
Traveler Name:  [Redacted]
Title of Event / Conference / Research / Trip:  Training
Destination:  Madison
Purpose of Expense / Travel:  Business
Total Estimated Cost:  $1,000.00
Expense Frequency:  One-Time
```
The supervisor may approve, deny, or modify and approve the request. If approved, the request then continues the approval process. Additional approvers based upon funding allocation review the authorization and can also approve, deny, or modify the authorization request. Each approver will receive an email notification prompting them to login and review/approve:

From: UWM Workflow Process Director <uwmm-uwfflowprod@uwmm.edu>

Subject: Primary Dean Review and Approve - TE15-86-00007

Travel and Miscellaneous Expense Authorization

You have received this message because you have been assigned a task in the Travel and Miscellaneous Expense Authorization process.

Primary Dean Review and Approve: Please review this request, make any adjustments as required and indicate your determination. To approve the request without adjustments, click the Approve button. To approve the request with adjustments, provide comments on your adjustments and click the Approve button. To reject this request, provide comments describing your reasons and click the Deny button.

You may click here to open the form related to this task.

Request Number: TE15-86-00007
Process Status: Dean Review
Traveler Name: [Redacted]
Title of Event / Conference / Research / Trip: Relocating to Lake Drive
Destination: Milwaukee
Purpose of Expense / Travel: Relocation
Total Estimated Cost: $10,000.00
Expense Frequency: One-Time
Once a determination has been made on the TMEA Form, the initiator and SSC receive an email notification:

Determination Notification (Authorized) - TE19-02-00022

You have received this message because a determination has been made regarding a Travel and Miscellaneous Expense Authorization request.

You may click here to open the form related to this request.

- Request Number: TE19-02-00022
- Process Status: Approved
- Traveler Name: [Redacted]
- Title of Event / Conference / Research / Trip: Training
- Destination: Madison
- Purpose of Expense / Travel: Business
- Expense Frequency: One-Time
- Total Estimated Cost: $1,000.00
- Total Approved Amount: $574.00