How to Budget Check a Travel Authorization or Expense Report

These steps apply to both Travel Authorizations and Expense Reports.

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STEP 1
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On the Pending Approvals screen, click on the Travel Authorization or Expense Report, whichever is applicable.

Employee Self Service			Pending Approvals	ଜ ଦ 🧔 ፡ 🙆
View By Type	~	Travel Authorization		
All	3	T		Approve Sendback Hold
Purchase Order	1			2 rows
Travel Authorization	2	Travel Authorization 550.00 USD	0000013122 /	Routed > 12/08/2022
		Travel Authorization 650.00 USD	0000013124 /Junio Funda 50210	Routed > 12/08/2022
		Approver Comments		
				li li
				S

STEP 2

On the Header page, click the Approve button in the upper right hand corner.

Pending Approvals	Travel Authorization	ଜ ଦ 🦉 :	Ø
Alexandria Peck			_
650.00 USD		Approve Sindback	
Header is pending your approval			
Summary			
Name /	Authorization ID	0000013124 Submitted for Approval	
Total Amount 650.00 USD	Date From	12/09/22	
Travel Auth Description Conference in St Paul	Date To	12/14/22	
Business Purpose Business - Out of State	Submission Date	12/08/22	
10000287307	Updated on	12/08/22 - 1:20 PM	
		Travel Authorization Details	
✓ Lines			
Date Evnanza Tuna	Amount	1 rov	1
DaterCxpense Type	Amount		
12/09/22 Domestic TR-Airfare	650.00 USD	>	
Approver Comments			
Approval Chain			
			3

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STEP 3
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In the Budget Check window, click the Run Budget Check button.

ıl	Budget Check	×
te	Commitment Control Details	
	Source Transaction Type Travel Authorization	- 1:20 PM
	Budget Checking Header Status Not Budget Checked	uthorization Detai
	Commitment Control Amount Type Encumbrance	
	Run Budget Check	
	L	

STEP 4

If the budget check is successful, a message will appear stating "All the lines have been Budget Check." If the budget check is not successful, please contact your agency fiscal officer. Click the OK button.

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exandria Peck 6.00 USD 1 Header is pending your approval			Approve Sendback
ummary			
Name Alexandria Peck Total Amount 650.00 USD Travel Auth Description Conference in St Paul	Authorizat Budget Check	ion ID 0000013124 Submitted for Approval	
Business Purpose Business - Out of State 0000287307	Commitment Control Details Source Transaction Type Travel Authorization Budget Checking Header Mattin	- 1:20 PM	
Lines Date/Expense Type	Commitme All the lines have been Budget Check.		1 ro
12/09/22 Domestic TR-Airfare	Commitment Control tran Date 12/08/2022		>
pprover Comments	Run Budget Check		
Approval Chain >			

Notice the Budget Checking Header Status now reads "Valid"

	Budget Check	\otimes
Commitment Control Deta	ails	
Source Transaction Type	Travel Authorization	- 1:20 PM
Budget Checking Header Status	Valid	uthorization
Commitment Control Amount Type	Encumbrance	
Commitment Control Tran ID	0152886079	
Commitment Control Tran Date	12/08/2022	
Run Budget Check		

STEP 6

The budget check process is now complete. Click on the X in the upper right hand corner to close the Budget Check window to proceed.

Pending Approvals	Travel Authorization		ଜ ዓ 🖉 ፤ Ø
Alexandria Peck 650.00 USD Header is pending your approval			Approve Sendback
Summary Name Alexandria Peck Total Amount 650.00 USD	Author	rization ID 0000013124 Submitted for Approval	
Travel Auth Description Conference in St Paul Business Purpose Business - Out of State 10000287307 V Lines Date/Expense Type 12/09/22 Domestic TR-Airfare Approver Comments	Budget Check Commitment Control Details Source Transaction Type Travel Authorization Budget Checking Head Budget Checking Head Status Commitment Control Discourse Commitment Control Tran Discourse Commitment Control Trans 12/08/2022	- 1:20 PM uthorization Details	t row
Approval Chain >			¢°