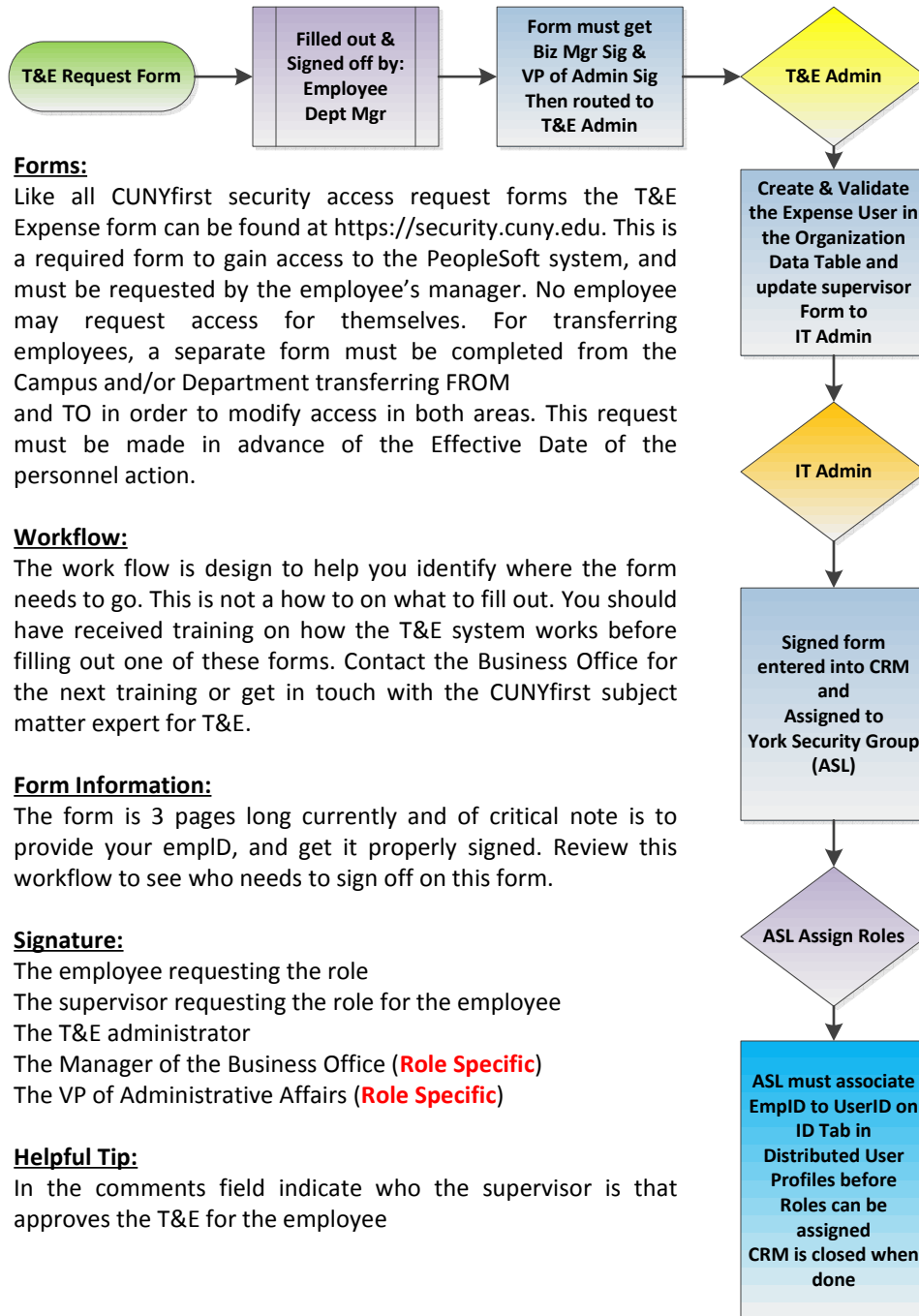


T&E Work Flow



Forms:

Like all CUNYfirst security access request forms the T&E Expense form can be found at <https://security.cuny.edu>. This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action.

Workflow:

The work flow is design to help you identify where the form needs to go. This is not a how to on what to fill out. You should have received training on how the T&E system works before filling out one of these forms. Contact the Business Office for the next training or get in touch with the CUNYfirst subject matter expert for T&E.

Form Information:

The form is 3 pages long currently and of critical note is to provide your emplID, and get it properly signed. Review this workflow to see who needs to sign off on this form.

Signature:

- The employee requesting the role
- The supervisor requesting the role for the employee
- The T&E administrator
- The Manager of the Business Office (**Role Specific**)
- The VP of Administrative Affairs (**Role Specific**)

Helpful Tip:

In the comments field indicate who the supervisor is that approves the T&E for the employee



Last Updated: 11/18/2014

CUNYfirst Travel and Expenses User Access Request Form - PRODUCTION

Please Note: This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action. Security is granted by Business Unit.

EMPLOYEE INFORMATION SECTION:	
Last Name:	First Name:
CUNYfirst Empl ID *:	Job
Title:	
Business Unit / Campus:	Department Name:
Work Phone:	Ext: CUNY email address:
CONFIDENTIALITY STATEMENT (Must be signed by the Employee):	
I understand that the data obtained from any CUNYfirst system is to be considered confidential and NOT to be shared with anyone who is not authorized to receive such data. I understand that I am individually accountable for the use of my User ID in the CUNYfirst system. Improper use of my User ID could lead to revocation of access rights and further disciplinary proceedings in accordance with CUNY policies, rules and regulations, and applicable collective bargaining agreements.	
Employee's Signature:	Date:

The Travel & Expense Administrator is responsible for following the steps in the Job Aid for Travel and Expense Administrators and coordinating with the campus ASL. Coordination is also required with the VMU to ensure that the expense user is also a vendor in CUNYfirst.

TRAVEL & EXPENSE ADMIN'S SECTION:	
Create and validate the Expense User in the Organization Data table	<input type="checkbox"/> Check if completed
T&E Admin's Signature:	Date:

Travel and Expenses Functional Roles

ASLs should assign roles below only AFTER the Travel & Expense Administrators in Campus have completed and signed the above section.

Note: ASLs must associate the Employee ID with the User ID on the ID tab of the Distributed User Profiles page.

Functional Role Description	Add	Remove
Travel and Expense Entry		
Travel and Expense Delegate Entry (Proxy)		
Travel and Expense Supervisor		
Travel and Expense Department Level 1		
Travel and Expense Department Level 2		
Travel and Expense Pre-Pay Auditor		
Campus Travel and Expense Administrator		