How to Search for Travel Documents and Payment Advice

The Travel Module has security settings in place that will only allow the traveler and the traveler's designated travel arranger(s) to view the travel documents. If you do not have access to the traveler via the travel arranger role, you will not be able to view the travel document.

Start by clicking on the "doc search" button on the left of Kuali.

Below is the Document Search screen:

In the Document Type section you will enter "TA" to search for Travel Authorizations or "TR" to search for Travel Reimbursements. After you type in the document type click "search". That will change your search screen to look like the below:
Remove the date auto-populated in the Date Created From box.

Any of the fields listed on the search screen are search options. You do not have to enter any additional information, however completing more fields will help narrow the search results. It is highly recommended to use the asterisk on either side of all search criteria you enter. Search for the traveler by entering the traveler first name* in the First Name box and the traveler last name* in the Last Name box. Click Search.
To search for a trip with the document T-number fill out the search screen as shown below:

Enter the Tem Doc # in the TEM Doc # field.

When you find the document you want, click on the underlined document number.
How to See if the Traveler has been Paid

This option will only be shown on the Travel Authorization when there is a Travel Advance, or the Travel Reimbursement. Also, before a traveler can be paid the document must be final regardless of the due date.

One you open your travel document, scroll toward the bottom of your document and click down arrow next to "Pre-Disbursement Processor Status:

Once you click the arrow, the below screen will appear:

Click the Disbursement Info button to see check/ACH number

<table>
<thead>
<tr>
<th>Disbursement Date</th>
<th>Payment Status</th>
<th>Disbursement Type Name</th>
<th>Disbursement Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/05/2024</td>
<td>Extracted</td>
<td>ACH</td>
<td>7913660</td>
</tr>
</tbody>
</table>

The PDP Extraction Date is the date the payment was pulled from Kuali. The PDP Paid Date is the date the payment information was sent to the bank. The processing of the payment could take up to 3 days to show in the traveler's bank account.