



Travel & Expense User Access Request Form Instructions

*Prior to completing this form, a **W-9 vendor registration** is required. Please click [here for details](#)

Any section that is missing and/or incomplete will delay your access

EMPLOYEE INFORMATION SECTION:

The employee requesting access to any Functional Roles must complete the EMPLOYEE INFORMATION SECTION with the required information. Please note, your CUNYfirst Emp ID is your 8 digit employee number.

TRAVEL & EXPENSE ADMIN'S SECTION:

Skip- For accounts payable staff only

FUNCTIONAL ROLE DESCRIPTION:

(select only those that apply to you)

Travel and Expense Entry – Check “add” if you do not have access to the module and will request reimbursement for travel and/or expenses now or in the future.

Travel and Expense Delegate Entry (Proxy) – Check “add” if you will enter travel or expenses on behalf of someone else. This person may be your supervisor, chairperson or you may enter travel authorizations and expense reimbursements for faculty members.

Travel and Expense Supervisor – Check “add” if you will approve/authorize employee travel & expense reimbursements (supervisor, chairperson, etc).

Travel and Expense Department Level 1 – Check “add” if you will be the department 1 approver. The department 1 approver is someone who oversees/manages budgets This person can be a dean, manager, director, etc.

Travel and Expense Department Level 2 – Check “add” if you will be the department 2 approver. The department 2 approver is someone who oversees/manages budgets and has the final approval. This person can be a dean, budget officer, or executive.

Travel and Expense Pre-Pay Auditor – For accounts payable staff only

Campus Travel and Expense Administrator – For accounts payable staff only

Travel and Expense Budget Reviewer – In the event that a supervisory role is vacant and there is no supervisor, chairperson, etc assigned to an employee, the travel authorization and expense report will route to this person. This option should only be assigned to someone as a backup to the original supervisor or chairperson.

Primary Permission List and Row Level Security is Required (Normal Handling):

CUFSDPAPxxx (Travel and Expense Only) – Check if you DO NOT have the Financial Supply Chain on your ENTERPRISE MENU when you first log in. (red background)

Keep Existing (Already a Finance User) – Check if you already have the financial supply chain.

Approvals and Special Consideration Section

FOR EMPLOYEE SECTION– Fill in your Last and First Name ONLY

MANGIERIAL REQUEST SECTION– Have your supervisor or chairperson complete this section

APPROVALS– Leave blank. For Business office use only.

SPECIAL CONSIDERATIONS OR COMMENTS– If you are a delegate (Proxy), list the name(s) and EMPLID(s) of each person you will enter travel and expenses for.

Hand-Deliver (DO NOT EMAIL) both completed W-9 Vendor Registration Form and the CUNYfirst Travel and Expenses User Access Request Form to the Accounts Payable Department located in E-413

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 Emp ID *:	Job Title:	
PayServ ID ('N' number found on paystub) *:		
Official Station* (work location street address/zip code):		
Business Unit / Campus:	Department Name:	
Work Phone:	Ext:	CUNY email address:
CONFIDENTIALITY STATEMENT (Must be signed by the Employee):		
<p>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.</p>		
Employee's Signature: _____		Date: _____

The Travel & Expense Administrator is responsible for following the steps in the Job Aid for Travel & 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
E-mail to SFS-FMS.Security@cuny.edu to set up Official Station in SFS	<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		
Travel and Expense Budget Reviewer		

Only One Primary Permission List is required

Primary Permission List and Row Level Security is Required (Normal Handling)

User's Primary Permission List & Row Level Security	
(Check ONLY ONE)	
<input type="checkbox"/>	CUFSDPAPxxx (Travel and Expense Only)
<input type="checkbox"/>	Keep Existing (already a Finance user)

Primary Permission List and Row Level Security is Required (HTR/HCS Only)

User's Primary Permission List & Row Level Security	
(Check ONLY ONE)	
<input type="checkbox"/>	CUFSDPAPHTR (Travel and Expense HTR Only)
<input type="checkbox"/>	CUFSDPAPHCS (Travel and Expense HCS Only)
<input type="checkbox"/>	CUFSDPAPHTRALL (HTR and HCS Both)*

**Purchasing and Payables Employees for HCS and HTR are common*

Primary Permission List and Row Level Security is Required (GRD/HON)

User's Primary Permission List & Row Level Security	
(Check ONLY ONE)	
<input type="checkbox"/>	CUFSDPAPGRD (Travel and Expense for all GRD/HON)*

**GRD does Purchasing and AP for I GRD/HON Business Units*

