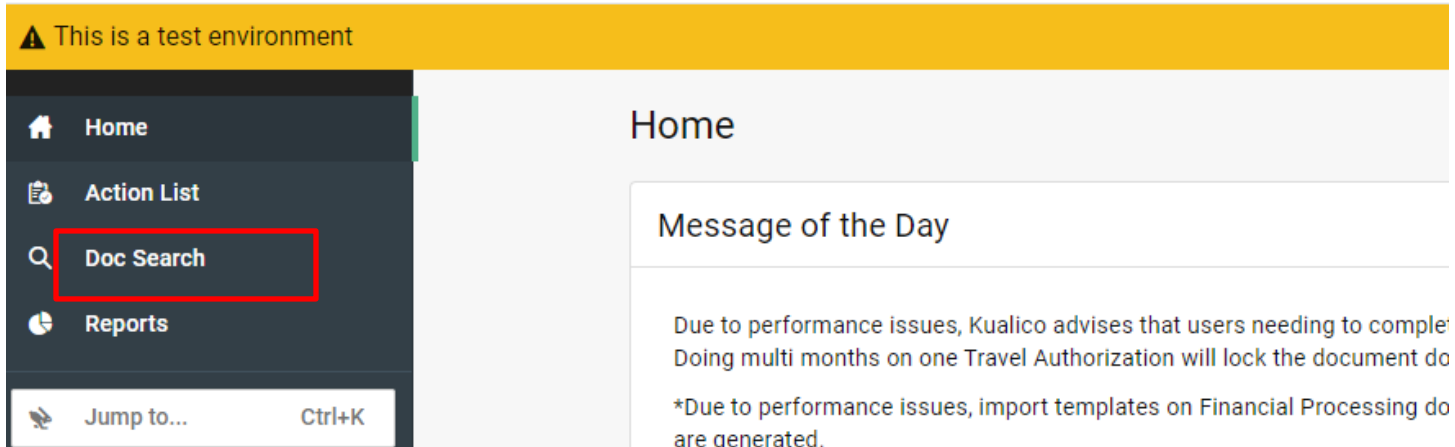


How to Search for Travel Documents and Payment Advice

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:

A screenshot of the "Document Search" screen. The title "Document Search" is at the top left. The search criteria are listed on the right side of the screen: "Document Type:" (highlighted with a red box), "Initiator:", "Document Id:", "Date Created From:", "Date Created To:", and "Name this search (optional):". Each field has a corresponding input box and a help icon. At the bottom right, there are three buttons: "search", "clear", and "cancel".

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:


Document Type: 


Initiator: 

Document Id:

Application Document Status:

- Awaiting Award Review
- Awaiting Budget Review
- Awaiting Disbursement Method Review
- Awaiting Division Review
- Awaiting Fiscal Officer Review
- Awaiting International Travel Review
- Awaiting Organization Review

Date Created From: 

Date Created To: 


Document Description:

Organization Document Number:

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

Primary Destination:


Trip Type Code: 

Traveler Type Code: All Customer Employee Non-Employee

First Name:

Last Name:

Primary Destination Country/State:

Object Code: 


Search Results

Document Id	Status	Document Description
34911851	FINAL	Docheff, Joshua J 01/12/2024 FORT WORTH
34842210	DISAPPROVED	Docheff, Joshua J 01/12/2024 FORT WORTH
34818479	CANCELED	Docheff, Joshua J 01/12/2024 FORT WORTH
34700097	FINAL	Donlay, Joseph W 02/04/2024 WASHINGTON
34699495	FINAL	Docheff, Joshua J 01/12/2024 FORT WORTH

To search for a trip with the document T-number fill out the search screen as shown below:

Organization Document Number:

TEM Doc #:

Trip Begin From: 

Trip Begin To: 

When you find the document you want, click on the underlined document number.

Search Results

Document Id	Status	Document Description	Organization Document Number
32874172	FINAL	Savran, Michelle Julia 08/02/2023 SAN J	T-182148

Export options: CSV | spreadsheet | XML

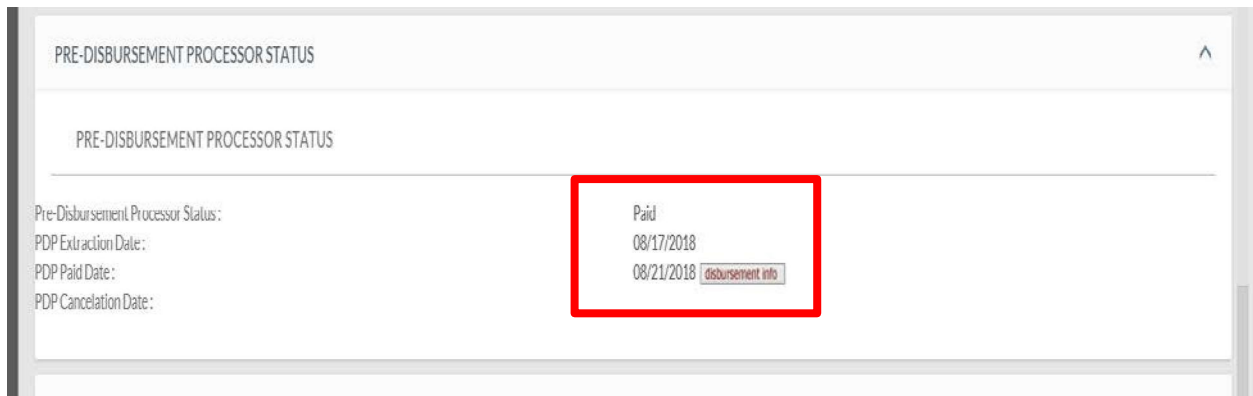
How to See if the Traveler has been Paid

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.

Once 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

Disbursement Date	Payment Status	Disbursement Type Name	Disbursement Number
03/05/2024	Extracted	ACH	7913660

The PDP Extraction Date is the date the payment was pulled from Kualu. 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.