

# MSH Faculty and Staff

## Navigating to the Travel Request Forms

1. Log into your Sinai Central account
2. Click **FINANCE** on your SC homepage
3. Click **Transactions**
4. Click **New**
5. Click **Travel Request** in the appropriate column (right for hospital)
6. Note the transaction number (**HT** for the hospital form)

### Detailed Instructions

#### A. Requester's Information

All of the Requester's information in the top row must be complete. If the mailbox or telephone numbers are missing, enter them into your [SC Personal Profile](#) [8].

Date of Request: <b>Feb 10, 2015</b>				<b>A</b>
<b>Requester's Name</b>	<b>Box #</b>	<b>Telephone</b>	<b>Department Name</b>	
MATTHEW S	0000 ▾	646.688.1662 ▾	071 - MSSM ▾	

#### B. Traveler's Information

Click **Set Traveler** to open the person-search tool. **Enter your name or life number and click Search.**

**Select the appropriate reason for submitting this form: Select highlighted**

- **Travel costs will be charged to a Mount Sinai fund [the most common scenario: traveler anticipates OOP expenses to be reimbursed]**
- Travel costs will be paid for by an outside entity [the traveler will not be covered by Mt. Sinai's insurance policy]. [Click here to see the note](#) about a 2019 change regarding this option.
- Traveler only wants to be covered by Mount Sinai's travel insurance policy [All costs were taken care of so the traveler doesn't anticipate any OOP]

<b>Traveler Information</b>			<b>B</b>	
Traveler:	<input type="button" value="Set Traveler"/>	Department		Please select a traveler.
Check here <input type="checkbox"/> if traveler is a student, postdoc, or fellow				
<b>Please select what applies to this travel</b> ⓘ				
<input checked="" type="radio"/> The cost of the travel will be charged to a Mount Sinai fund number.				
<input type="radio"/> The cost of the travel will be paid or reimbursed by an external entity.				
<input type="radio"/> For insurance purposes only.				

#### C. Traveler's Information

As of May 2019 the school Travel Request form asks whether the traveler will be performing clinical work while abroad. If answered in the affirmative the form displays a text box for entering a description of that clinical work. Answers to this question are reviewed by the medical school's Office of Global Operations.

**Enter the departure and return dates, the purpose of the trip, and the destination(s).**

If the travel will be outside the United States and Canada, click the **foreign checkbox** and enter the country. Select the trip's purpose from the drop-down box. Some options will cause additional questions to be displayed.

### Trip Information

**Will you be doing clinical work while abroad?**  
 Yes  No (Please Choose One)  
Please briefly describe the clinical work you will be doing:

From to    Number of days:

Departure Date:  (mm/dd/yyyy)

Return Date:  (mm/dd/yyyy)

Purpose: Professional Society/Conference/Meeting

Society name:

Destination:

Foreign?	City	State	Country
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	USA/Canada

## D. Funding

This section disappears if you select *the Travel Insurance Only* option.

Select your fund (school fund- 01662210) and object code from their respective drop-down boxes.

To split the charges among funds, click **Add Additional Funding**.

### Charge Travel Expenses To

Fund: 02042943 INFORMATION TECH     Object Code: 4464 - Domestic Travel

[Additional Funds for Split Coding](#)

NEW FT 1  %  Percent from fund

**Important: The charged funds are what determine which travel form you must use.** (Ineligible funds don't show up in the fund-selection box on the wrong form).

- If the trip will be charged to a school or FPA fund (starts with **02-**) you need to use the **School** Travel Request (**TR**) form
- If the trip will be charged to an MSH fund (starts with **01-**) you need to use the **MSH** Travel Request (**HT**) form
- (residents use this only)

When you split funds the system automatically generates one or more Fund Transfer transactions that will balance the charges against the specified funds. These Fund Transfers are issued their own transaction numbers and are routed through the normal approval workflows; the Fund Transfers for splitting funds must be approved before the Travel form will be processed.

## E. Estimated Travel Expenses

This section disappears if you select *Paid by External Entity* or *Travel Insurance Only* options.

If the travel will involve air travel click the appropriate radio button, which will display several follow-up questions:

- On which airline are you traveling?
- Are you flying coach (i.e., economy)?
- Did you book your flight via the Axiom travel agency?

Estimated Travel Expenses

E

<p>TRANSPORTATION <i>Airplane, Train, Car (Personal/Rental)</i></p>	<p>Travel by airplane? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <div style="border: 2px dashed red; padding: 5px; margin: 10px 0;"> <p>Enter Airline for Fly America Act: <input type="text"/></p> <p>Flying coach? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Travel booked through AXIOM? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> </div>	<p>Estimated Cost</p> <p>-\$ <input type="text"/></p>
HOTEL		-\$ <input type="text"/>
PER DIEM		-\$ <input type="text"/>
REGISTRATION FEE		-\$ <input type="text"/>
OTHER		-\$ <input type="text"/>
Total Estimated Expenses		-\$ <input type="text" value="0.00"/>

## F. Travel Insurance

By default the Travel Beneficiary is set to “Traveler’s Estate.” After you select the traveler at the top of the form, the beneficiary and beneficiary’s address fields down below become editable.

**Travel Insurance**

F

**Accidental Death & Dismemberment  
Travel Insurance for Employees**

The Traveler's estate will be the beneficiary unless modified by the traveler in Sinai Central prior to the date of travel.

**G. Comments**

Enter comments for approvers and Finance staff here.

*Comments:*

G

Click **Save Draft** to save your work along the way. This has the additional benefit of refreshing the left menu so you can see additional transaction options including the **Attachments** link, which enables you to upload relevant documents. To return a draft to editable mode click **EDIT** on the left menu. When you are finished, click **Submit Request** to send the form for approval.

