


Page 1 of 4 - TAX LEVY & NON_TAX LEVY EMPLOYEES - INFORMATION SECTION:



Updated: 7/1/2020

TRAVEL AND EXPENSES

User Access Request Form

This form is required to gain access to the CUNYfirst Travel & Expenses system, and must be requested by the employee's manager. Employees may not request access for themselves without appropriate approvals. For transfer employees, separate Travel & Expenses forms must be completed to terminate access at the original Campus and to establish access at the new Campus.

Tax Levy & Non-Tax Levy Employees - Information Section

Clear Section

Last Name	A.	First Name	B.
CUNYfirst EMPLID	C.	Job Title	D.
College	E.	Department Name	F.
Work Phone #	G.	CUNY E-mail Address	H.
Home Address	I.		Apt # J.
City	K.	State L.	Zip Code M.

- A. Employee Last Name
- B. Employee First Name
- C. CUNFirst EMPLI ID
- D. Job Title
- E. College – Select college name from drop down - Lehman College
- F. Department Name
- G. Work Phone Number
- H. CUNY E-mail Address
- I. Home Address
- J. Apt. # (if applicable
- K. City (of home address
- L. State (of home Address
- M. Zip Code (of home address

Page 1 of 4 – **STATE TAX LEVY_EMPLOYEES ONLY:**

State Tax Levy Employees ONLY					Clear Section	
PayServ ID	<input type="text" value="A."/>					
Work Address	<input type="text" value="B."/>					
City	<input type="text" value="C."/>	State	<input type="text" value="D."/>	Zip Code	<input type="text" value="E."/>	

- A. **PayServ ID** - "N" NYS EMPLID number found on employee pay stud
- B. **Work Address** - Work location (250 Bedford Park Blvd West)
- C. **City** - of the work address (Bronx)
- D. **State** - of the work address (NY)
- E. **Zip Code** - of the work address (10468)

Page 1 of 4 – **CONFIDENTIALITY STATEMENT:**

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

A.

Date

B.

in the absence of written signature: Employees may accept the Confidentiality Statement in CUNYfirst via Employee Self Service. Go to: <https://home.cunyfirst.cuny.edu>, log in and navigate to, Human Capital Management > Self Service > CF Confidentiality Statement

Confidentiality Agreement Code:

C.

- A. Employee Signature
- B. Date
- C. "In the absence of written signature" follow instructions in yellow and enter the 10-digit security number in the Confidentiality Agreement Code

PAGE 2 of 4 - TRAVEL & EXPENSE ROLES

Travel & Expenses Roles				Clear Section
Entity	Functional Role	Business Unit	Action	
A.	B.	C.	D.	

* All **Employees** must provide their default set of chartfields and their Supervisor's CUNYfirst EMPLID, see section (A) below
 ^ All **Proxies** must provide the CUNYfirst EMPLID for all employees for whom they will be entering data, see section (B) on Page#3
 > All **Supervisors** must provide the CUNYfirst EMPLID for all employees for whom they approve in T&E, see section (C) on Page#3
 < All **Department Approvers** must provide CUNYfirst Dept #, Approval level (LV#1 / LV#2 / NTL) & BU, see section (D) on Page#3

A. Entity - Using the drop-down menu, select "Tax Levy" or "Non-Tax Levy"

B. Functional role - Using the drop-down menu, select the role you need

Travel & Expense (T&E) Employee – if requesting access to submit travel reimbursement request

T&E Proxy – if creating travel reimbursement requests on behalf of supervisor (Dean/AVP/VP/President) this role is for department secretary or administrative assistant

T&E Supervisor – this role is for Head of Department, approve expense reimbursements for faculty/staff (Ex: Dept. Chair, Dept. Mgr./Dir)

T&E Dept. Approver LV#1 – Tax Levy – this role is for Head of Department (Supervisor) unless otherwise indicated by Accounts Payable

T&E Dept. Approver LV#2 – Tax Levy – this role is for the second approver within the Division or School (Ex: Dean/Provost/VP)

T&E Dept. Approver – Non-Tax Levy – this role is for the Head of Department, who will approve expense reimbursements

- Note 1: In some cases, depending on job title a person may be assigned to several roles – For example a dean can have Travel & Expense Employee, Travel & Expense Supervisor, Travel & Expense Approver LV#1 and LV#2.
- Note 2: Expense reports under Tax Levy funds (LEH01) require two approvers.
- Note 3: Expense reports under Non-Tax Levy – require only one approver. Non-Tax Levy includes LEH02 – LEH03 – LEH04 – LEH55 - LEH13 and LEH16

C. Business Unit - Using the drop-down menu, select the appropriate business unit.

D. Action - Using the drop-down menu, select “Add” or “Remove”

Page 3 of 4 - **SECTION B – PROXY**

Section (B) - As a Proxy you can perform data entry on behalf of employee(s). (If there are more than two employees, add them to the special consideration section at the bottom of page #4).

Clear Section

Proxy EMPLID **A.**

Authorized for Employee's EMPLID **B.**

Authorized for Employee's EMPLID **C.**

- A. Proxy EMPLID – CUNYfirst EMPLI ID of the employee assigned to the Proxy role.
- B. Authorized for Employee's EMPLID – The EMPLI ID of the employee on whose behalf the Proxy will be entering the data entry for.
- C. Authorized for Employee's EMPLID – Same as "B" above.

Note: If the Proxy will be performing this role for more than two employees, go to page #4 under Special Considerations or Comments list the other employees name and CUNYfirst Empl ID.

Page 3 of 4 – SECTION C - SUPERVISOR

Section (C) - As a **Supervisor** you can approve T&E transactions for employee(s). (If there are more than two employees, add them to the special consideration section at the bottom of page #4).

Supervisor EMPLID Clear Section

Approve for Employee's EMPLID

Approve for Employee's EMPLID

Transaction. Two department approvers are required for Tax Levy

- D. **Supervisor EMPLID** - The EMPLID of the Supervisor who will approve the travel authorizations and the travel and expense reports in CUNYfirst.
 - E. **Approve for Employee's EMPLI ID** - Enter the EMPLID of the employee for whom the travel authorizations and the travel and expense reports are being submitted for. Ex. The person using the travel card.
 - F. **Approve for Employee's EMPLI ID** - Same as "E" above.
- Note: If the Supervisor will be performing this role for more than two employees, go to page #4 under Special Considerations or Comments and list the other employees name and CUNYfirst Empl ID.

Page 3 of 4 – SECTION D – DEPARTMENT APPROVER

Section (D) - Department Approver is the fiscal approver for a T&E transaction. Two department approvers are required for Tax Levy. The same person may be a department level 1 and department level 2 approver. Non-Tax Levy requires only one level of approval. (If there are more than six departments, add them to the special consideration section at the bottom of page #4).

[Clear Section](#)

Approver EMPLID	A.	Department Number	B.	Level	C.	Business Unit	E.
		Department Number		Level		Business Unit	
		Department Number		Level		Business Unit	

- A. APPROVER EMPLID – The EMPLI ID of the department approver
- B. Department Number - See Chartfield Structure list
- C. Level - Using the drop-down select Level 1 or Level 2
 - Level 1 – if your role is also Travel & Expense Supervisor
 - Level 2 – if you are the second approver for Division/SchoolNote: The same employee can be assigned Level 1 and Level 2 roles
- D. Business Unit – Using the drop-down select LEHPR for Lehman College Tax-Levy.

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Fillable by T&E Administrator ONLY – Skip this section

Primary Permission List and Row Level Security is Required - Skip this section

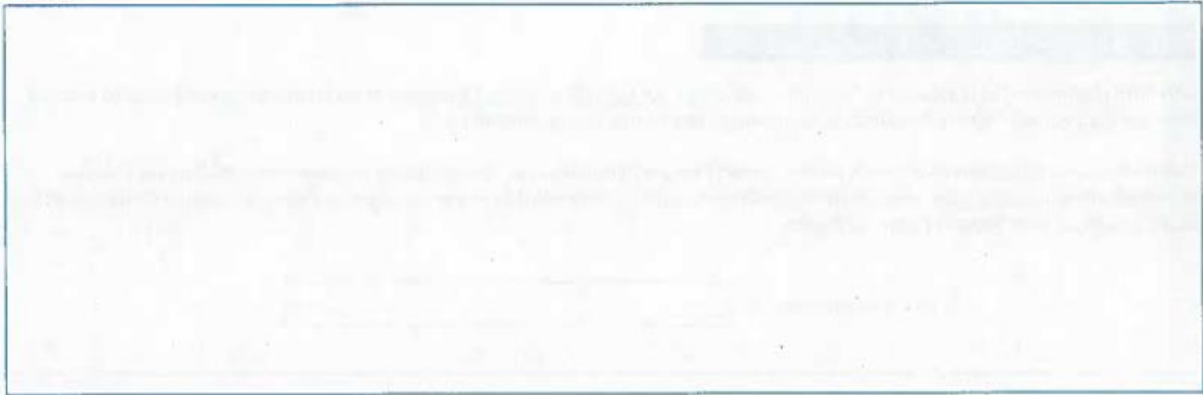
Page 4 of 4 – Approvals and Special Considerations

Approvals and Special Considerations		In the absence of written signature: Managers and Campus Approvers may email approval to the appropriate campus party, per campus' request process.	
For Employee			
Last Name	A.	First Name	B.
Managerial Request			
Manager Last Name	C.	Manager First Name	D.
Manager Signature	E.	Date	F.

- A. Employee Last Name – Field will auto fill
- B. Employee First Name – Field will auto fill
- C. Manager Last Name (Employee's supervisor)
- D. Manager First Name
- E. Date

Skip the “campus Approvals” and Central Office Approvals, ONLY section.

Special Considerations or Comments



If applicable, this section should contain additional information requested for Proxies, Supervisors and Department Approvers (See page 3 of 4 Sections B, C and D).