Kuali TEM Module

Part 3:
International Travel
International Travel Approvals
Group Travel

Presented by Travel Services

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TEM TRAINING OVERVIEW

- **Part 3 – Group & International travel**

- How to use the Group tab in the Travel Authorization document

- Risk Management's role for International travel

- How to prepare Travel Authorizations and Reimbursements for International travel

GROUP TRAVEL

– Group travel is often organized by a leader, or a few individuals, who manage all expenses associated with the trip
  • **Group leader is responsible for collecting all receipts**

– Reimbursement will only be made to the Primary Traveler on the TR document, not to the travelers listed on the group travel tab.

– Anyone with a TEM Profile can be imported into the document using the the Group Travel tab

– All international travelers MUST complete a separate TA. Risk Management does not currently have the ability to approve group travelers and can only provide Intl approval for primary travelers

GROUP TRAVEL

Who needs a TA?

– Every traveler that will be going as part of the group

– TA needs to be submitted for each individual

– If no reimbursement is anticipated the TA should be cancelled and then referenced on the Group Leader TA

Who needs a TR?

– Any traveler that will receive reimbursement

– Typically only the group leader submits a TR document as they are in charge of the group expenses

INTERNATIONAL INFORMATION

- Emergency contact information including in-country contact phone number will be required for all trips.

- Please make sure that all itinerary information including No Cost business travel is included in TA.

- Multiple destinations must be entered using the per diem table

- Primary destination must be an International location

INTERNATIONAL INFORMATION

- Per diem table requires lodging information
  - On first day and last day nights the same hotel information can be entered to satisfy the required information fields
  - Even if personal box is checked the field is still required

- International receipts
  - Not uncommon to have handwritten/signed receipts for local guides and drivers
  - Hotels may not provide full folios like domestic hotels
  - Provide as much information regarding proof of payment as possible
  - Translate receipts <u>and</u> convert to US Dollars

INTERNATIONAL TRAVEL APPROVALS

- RMI approval is automatically integrated with the Kuali TEM process for approval of faculty travel

- Students must obtain approval from international programs before traveling internationally
    - Students should check with OIP to ensure proper insurance is in place. In some cases supplemental insurance may need to be purchased. Be sure to explain in the Notes & Attachments box

- RMI approval email is generated from the system, and needs to be attached to the TA document prior to the DHA review and approval

- Saved documents, ad hoc to initiator, or ad hoc complete will not allow document to be reviewed by RMI review process
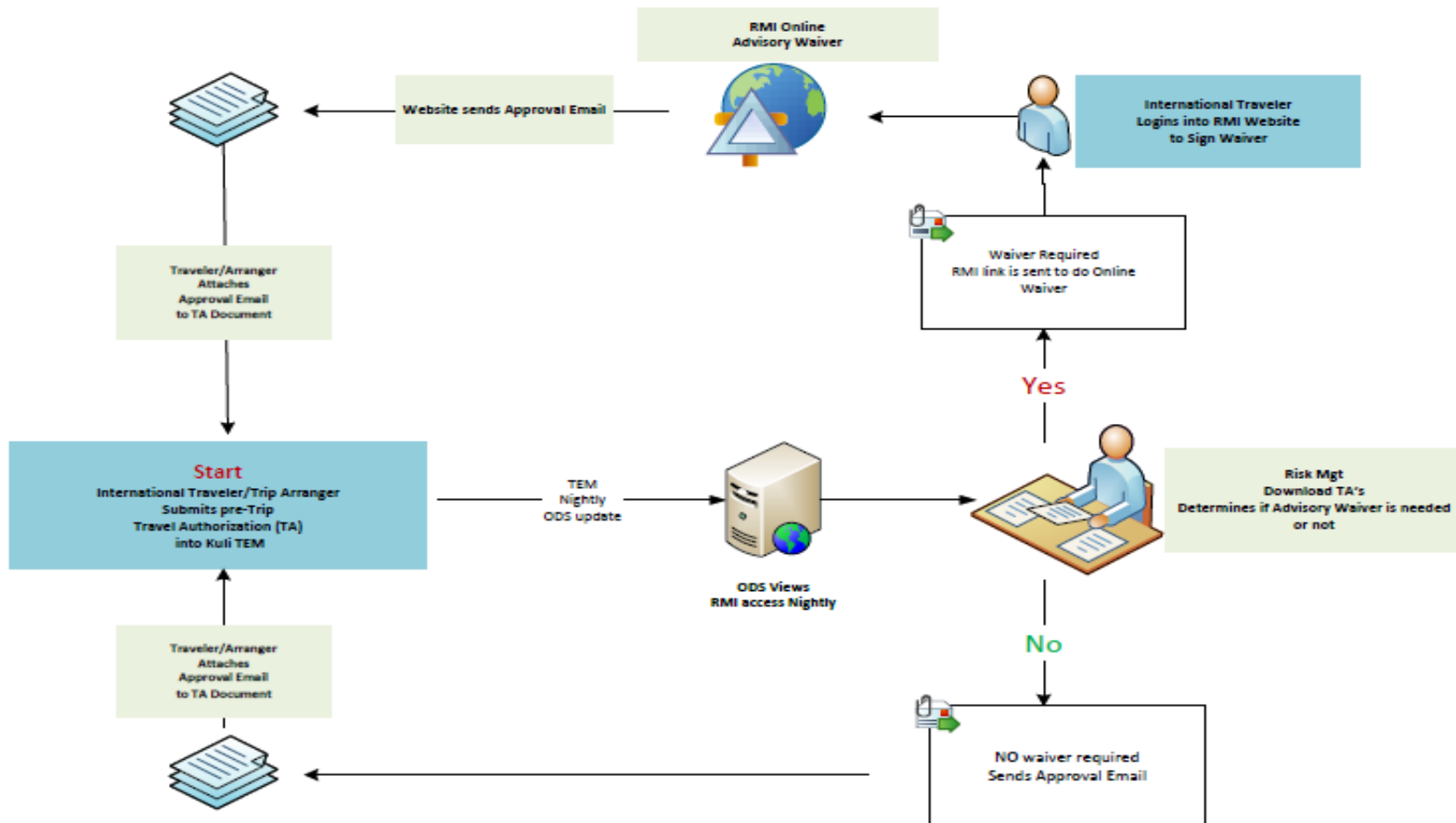
RMI APPROVAL PROCESS

- Travel arranger prepares TA document ensuring that ALL information pertaining to traveler's international trip is included. Primary destination, all accommodation, all other countries (per diem locations even if no cost.)

- If destinations (primary and per diem destinations) are NOT subject to a travel advisory RMI sends an approval email to the travel arranger and/or the traveler. Simply attach this approval email to the TA for further routing.

- If destination is subject to a travel advisory – traveler is sent an email with a link to an electronic travel advisory waiver. Once completed by traveler, approval email is automatically sent to traveler and/or travel arranger. Waivers should also be attached to the TA.

RMI-Kuali TEM International Travel Approval Process

RMI Online Advisory Waiver

Website sends Approval Email

International Traveler Logins into RMI Website to Sign Waiver

Traveler/Arranger Attaches Approval Email to TA Document

Waiver Required
RMI link is sent to do Online Waiver

Yes

Start
International Traveler/Trip Arranger Submits pre-Trip Travel Authorization (TA) into Kuli TEM

TEM Nightly ODS update

ODS Views RMI access Nightly

Risk Mgt Download TA's
Determines if Advisory Waiver is needed or not

Traveler/Arranger Attaches Approval Email to TA Document

No

NO waiver required Sends Approval Email

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RMI APPROVAL PROCESS

Select Trip Type Code International

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RMI APPROVAL PROCESS

– Use magnifying glass to "return value"

– Many International Destinations have few options

– If Destination is not found select OTHER

6 items retrieved, displaying all items.

Return Value	Region	County	
return value	AUT		LINZ
return value	AUT		INNSBRUCK
return value	AUT		SALZBURG
return value	AUT		GRAZ
return value	AUT		OTHER
return value	AUT		VIENNA

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RMI APPROVAL PROCESS

– Do Not enter destination manually

– The RMI automated approval process will not pick this up in the nightly ODS update and will not be reviewed for approval

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RMI APPROVAL PROCESS

- What if my traveler has multiple destinations?

  - Multiple locations can be entered in the per diem table

  - Please enter all locations even if there are no reimbursable expenses
    - This will help locate the traveler in an emergency situation

  - If there are both International and Domestic destinations please make sure that the International Destination is entered as the Primary Destination

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- What if my traveler has multiple destinations?
  - Use magnifying glass to enter new destinations
  - Do not use "destination not found" to enter manually
  - Select the personal box if no reimbursement needed

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RMI APPROVAL PROCESS

International Approval for Group Travel

– When multiple travelers are processed on one document only the primary traveler is identified

– If approval is needed for all travelers a TA document will need to be submitted for each individual traveler

– The automated RMI process does not look at the group travel tab or note and attachments where additional travelers may be listed

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Travel Reimbursement process

– Approval email from RMI must be attached in the notes and attachments section on the TA

– Travel will request a copy of this be attached to the document before processing reimbursement

– If email is not received when TA is submitted please inquire why at this time. This document is for PRE approval.

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- **BFS TRAVEL RESOURCES**
- **Travel website**
  - **http://busfin.colostate.edu/trv.aspx**
  - **FAQ, forms, training guides, workflow charts, links**
  - **Contact Information**
  - **Updates on what documents currently being processed**
- **BFS TEM User email**
  - **Bfs_tem_users_questions@mail.colostate.edu**
  - **Central email designed to improve response time**
- **TEM Arranger listserv**
  - **Sign up on ACNS website to receive updates intended for travel arrangers**

QUESTIONS?

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