

Kuali TEM Module

*Part 3: International Travel, Group Travel, and
International Travel Approvals*

Presented by Travel Services



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TEM TRAINING OVERVIEW

- **Part 1 – What we have learned**
- New terminology, functionality, and acronyms for our new travel documents
- How to prepare TEM Profiles, Travel Arranger documents, and how to process an In-State travel reimbursement
- How to look up documents and use the route log to monitor travel documents for approvals



TEM TRAINING OVERVIEW

- **Part 2 – What we have learned**
- Travel advances
- How to prepare Travel Authorizations for Out-of State travel
- How to issue reimbursements from Travel Authorization documents
- How to make sure Travel Authorizations are closed so that encumbrances are relieved



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
- How to use the Oanda link and Currency Converter



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



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 TRAVEL APPROVALS

- RMI approval is now automatically integrated with the Kualu TEM process for approval of faculty travel
- Students must obtain approval from international programs before traveling internationally
- 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 the traveler. Simply copy 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 travel arranger



RMI APPROVAL PROCESS

- Select Trip Type Code International

Trip Information Section	
* Trip Type Code:	<div style="border: 1px solid gray; padding: 5px;"> In-State International Out of State </div>
* Trip Begin:	11/09/2013 04:32 PM
* Primary Destination:	<div style="border: 1px solid gray; padding: 5px;">  destination not found </div>
Primary Destination Country/State:	



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	<u>Region</u>	<u>County</u>
<u>return value</u>	AUT	LINZ
<u>return value</u>	AUT	INNSBRUCK
<u>return value</u>	AUT	SALZBURG
<u>return value</u>	AUT	GRAZ
<u>return value</u>	AUT	OTHER
<u>return value</u>	AUT	VIENNA



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

Trip Information Section	
* Trip Type Code:	International <input type="button" value="v"/>
* Trip Begin:	11/06/2015 04:52 PM <input type="button" value="calendar"/>
* Primary Destination:	<input type="text"/> <input type="button" value="magnifying glass"/>
	<div style="border: 1px solid gray; padding: 2px; display: inline-block;">destination not found</div> Per Diem Links



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 an International Destination is entered as the Primary Destination**




- 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

Estimated Per Diem Expenses ▼ hide

Estimated Per Diem Expenses


Trip Detail: 11/19/2015

Country State	County	* Primary Destination	Personal	Breakfast
KAZAKHSTAN		ALMATY  ←	<input type="checkbox"/>	11.14
		<small>destination not found</small>		

International Accommodation Information

Accommodation Type:	<input type="text" value=""/>	Name (i.e. Hotel):	<input type="text" value=""/>
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Trip Detail: 11/20/2015

Country State	County	* Primary Destination	Personal	Breakfast
TANZANIA		ARUSHA  ←	<input type="checkbox"/>	15.00
		<small>destination not found</small>		



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



- **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.

Notes and Attachments (1) ▼ hide

Notes and Attachments				
	Posted Timestamp	Author	* Note Text	Attached File
add:			<input type="text"/>	<input type="text"/> <input type="button" value="Br"/> <input type="button" value="CANCEL"/>
1	11/03/2015 08:29 AM	[Redacted]	[Redacted] Risk Management International Travel approval	[Redacted] 11-28 south africa rmi approval.pdf



- **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?

- **General Travel Questions:**
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- Chris DeMint: 491-2291
- Grant Polzer: 491-2040

