Kuali TEM Module

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

Presented by Campus Services and 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 Kuali 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 electronic signature

• Saved documents, or 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.)

• Traveler or admin are no longer required to register separately with RMI as RMI routing is integrated into the Kuali TEM process

• 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
RMI APPROVAL PROCESS

- Use magnifying glass to “return value”
- Many International Destinations have few options
- If Destination is not found select OTHER

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</tr>
<tr>
<td>return value</td>
<td>AUT</td>
<td>VIENNA</td>
</tr>
</tbody>
</table>
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
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
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.
• BFS TRAVEL RESOURCES
  • Travel website
    – [http://busfin.colostate.edu/trv.aspx](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?

• **Kuali Help or Business/Financial Questions:**
  • Erin Mercurio: 491 – 6752
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  • David Leathers: 491-5509

• **General Travel Questions:**
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