**TRAVEL PROCEDURES**

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1. Get approval for travel.
   1. As soon as you find out about your trip you need submit a pre-approval travel form through [Travel Approval Request](https://apps.atlas.illinois.edu/FormBuilderSurvey/Survey/LAS/SESE_HR/SESE_Travel_Pre_Approval_Form/) and log in with your net id and password.
   2. This MUST be done prior to travel, not doing so may result in travel not being reimbursed by the University.
   3. No purchases by the University will be made until travel is approved, you will be notified by email once your travel is approved.
2. Fill out TEM compliance form ( 1 time submission for entirety of UIUC journey)
   1. Compliance form gives you access to Travel and Expense Management (TEM) site.
   2. Allow 3 business days to be granted permission.
   3. You should be notified once you are granted access. After you have been granted TEM access, you will need to add me as a proxy. (You will only need to add me as proxy once, you may have to add other people as proxy if others assist you with expense reports, you will follow these same directions)
      1. go to <http://www.obfs.uillinois.edu/tem-resources/>
      2. click on the “Login to TEM” on the right of the page.
      3. At the log in screen, log in using your enterprise user id and password.
      4. Once logged in, you will be on the Expense Management inbox screen. From here, click on the “My Info” icon tab at the top of the inbox.
      5. Once on the “my info” screen, select the “creator proxy” tab.
      6. Under “application”, select the drop down menu item “expense report”, then enter my net id, **jeffris2**, in the proxy user id field, then click “add proxy”.
      7. Again, under the application drop down, select “travel plan”, enter **jeffris2** in the proxy user id field, and click add proxy. That should complete the required actions.
3. Request purchases to be made by the University (preferred) or make your own travel arrangements.
   1. Flight, Lodging, Bus tickets, Conference Registration, Abstract Fees can all be paid through the University.
   2. Please Provide Travel information and Preferences for General purchase via (general) [General Traveler Information for Airfare, Car Rental, and Lodging](https://forms.illinois.edu/sec/4673596) . You will only need to fill this form out once.
      1. This form merely lets us know your preferences and provides general information for flights, such as birthday and gender.
   3. Provide information for (specific) travel purchase request here [Traveler Purchase Request](https://forms.illinois.edu/sec/7210223)
      1. This should be requested for each time you travel after submitting your travel approval.
   4. You are also allowed to purchase your travel items with your own funds and get reimbursed.
      1. If you decided to make any purchases yourself it is still a good idea to check in with Joe to makes sure purchases meet University policies. (mostly for flights and lodging)
         1. If you are concurrently on travel for anything other than business purposes, comparison flight tickets will be needed when you get reimbursed. Please notify me if this is the case.
         2. Air bnb’s are allowed as well as bookings through third party sites; as long as they are the most economical choices.
   5. Local transportation, car rental, gas, and food/meals will be reimbursed after the trip has ended.
      * 1. Uber, Lyft, and other rideshares are allowed to be reimbursed as long as there are no surge pricings nor premiums associated. (If you are unsure, use a taxi)
4. Turn in receipts once the trip has ended.
   1. Submit reimbursement form through [Reimbursement Submission Portal](https://forms.illinois.edu/sec/6801131) or deliver your reimbursement form with all receipts you need reimbursed, with the exception of food receipts (you will be reimbursed on a per diem rate), to Joe as soon as possible. Any receipt not turned in may result in you not being reimbursed.
      1. Once the completion of your reimbursement has been entered into TEM, You will be notified via email to submit or if you are missing any documents. (Please allow 1-2 weeks after receipts are turned in for submission email)
5. Submit Expense report
   1. Log into TEM
   2. On the main page, under the My Documents tab, you should have document(s) to submit. Select only the document you were notified about.
   3. You can select the little pencil icon to view the item. The first view will show you the overview, or you can change the view by clicking the items tab to see details.
   4. If you are satisfied, you can click “Submit” at the top of the page. Please do not alter the items entered into TEM, because there is a lot of back-end paperwork that must match the final submission. If you feel there has been an error, let me know, and I will correct it.
6. Wait
   1. It can take up to 4-6 weeks to be reimbursed. Typically within 2 weeks reimbursements are fully processed. They do not notify if your expense report is fully processed, you will have to check occasionally until the expense report has disappeared from your view to know if it has completed.
   2. You may get a rejection and you will be notified if this occurs as well as any proxy that completed the form for you. The expense report submitted will have to be corrected according to the note left in the rejection.
      1. Adjustments will be made accordingly and you will be emailed again asking you to submit the expense report.
   3. Your reimbursement will be directly deposited to your university affiliated bank account

Notes: If your receipt submission isn’t within submitted in TEM within 60 days of the end of travel your reimbursement will be taxed and as income. Please submit your receipts as soon as possible to allow for appropriate amount of time to be entered into the TEM system.

**Important Links**

**TEM Login**

<https://www.obfs.uillinois.edu/tem-resources/>

**Travel Approval Request**

<https://apps.atlas.illinois.edu/FormBuilderSurvey/Survey/LAS/SESE_HR/SESE_Travel_Pre_Approval_Form/>

**General Traveler Information for Airfare, Car Rental, and Lodging**

<https://forms.illinois.edu/sec/4673596>

**Traveler Purchase Request**

<https://forms.illinois.edu/sec/7210223>

**Reimbursement Submission Portal**

<https://forms.illinois.edu/sec/6801131>