**Student Travel (Process will change July 1, 2024 with implementation of DASH)**

1. Non-employee Students: Non-employee students will need to be added as guest travelers in IRIS using transaction ZPHRRECORD000 (https://irisweb.tennessee.edu), have students complete the **T-24 form** for the information you need to enter in IRIS.

2. International Travel: All students traveling internationally will need an approved Travel Request in Concur (https://travel.tennessee.edu) and will need to register with Center for Global Engagement (https://volsabroad.utk.edu) **NOTE**: non-employee students do not have access to Concur, when you add them as a guest traveler in IRIS, you have delegate access and must enter the Travel Request for them.

3. UT students are covered by international health insurance if they have an approved Travel Request in Concur **and** have registered through Center for Global Engagement (CGE) **prior to the trip**. Details are available here: https://cge.utk.edu/intlsos/. *Questions regarding the CGE travel registration should be directed to itr@utk.edu.

4. Student travel requires collecting emergency contact information and sharing this information with both the faculty/staff traveling with the students and someone in the department/unit. The information can be placed in an excel sheet saved to SharePoint/One Drive/Google Drive for ease of sharing. The most efficient way to collect the data is a Microsoft Form. You can find and use my editable template here: https://tiny.utk.edu/StudentTravelFormTemplate.

5. Faculty/Staff traveling with the students can use their UT Travel Card to pay for travel expenses, **within policy** (https://policy.tennessee.edu/policy/fi0705-travel-2/), for students. If this is the plan, have the faculty/staff request an increase of the max limit on their card in Concur (https://travel.tennessee.edu).

6. If the faculty/staff traveling with the students does not have a travel card and does not intend to request one, some expenses, **within policy** (https://policy.tennessee.edu/policy/fi0705-travel-2/), can be paid using an admin’s centrally held travel card. These include airfare and domestic lodging (call the hotel at least 10 days prior to arrival and request a Credit Card Authorization Form). Note that rental cars cannot be paid for by a third party, only booked. However, if the trip is domestic, UT Fleet Management vehicles can be requested for the faculty/staff traveling with the students here: https://fleetmanagement.utk.edu/services/

7. Note that some group travel requires a contract-if the vendor requests that an agreement is signed, this must be processed through the **contract system** **DO NOT SIGN ANYTHING** from an external vendor. If the total cost from a single vendor is over $10,000, a contract is required.
Entering a (Non-Employee Student) Guest Traveler in IRIS

Log in to IRIS https://irisweb.tennessee.edu and use transaction ZPHRREC0RD000 to record a guest traveler.

Enter the guest traveler’s social security number (travel reimbursements are taxable income) and enter the effective date (first day of travel). Then, click on “Request” at the top center of the screen.
A new page will open. Fill out everything you can for the guest traveler, then scroll to the bottom of the page.

At the bottom of the page, you can change or add delegates for the guest traveler. Make sure you have selected “Non-Employee Student” at the very bottom. Once you have the delegate(s) you need, click on “Submit for Approval” at the top center of the screen.

You will receive an email from IRIS once the guest traveler is fully approved. This will contain a personnel number also.
24-48 hours after you receive the email, the guest traveler should be loaded into Concur. When you log in, select “Profile” at top right, then enter the guest traveler’s name in the search field. Select the guest traveler from the drop-down box.

Now you are able to enter travel requests and prepare and submit expense reports for the guest traveler.
THE UNIVERSITY OF TENNESSEE
GUEST TRAVELER WORKSHEET

Use this worksheet to gather information to record a guest traveler in IRIS. Blue fields are department responsibility, yellow fields are the traveler’s responsibility.

Name: ___________________________ ___________________________ ___________________________  Last  First  Middle

Personnel # (Rehires) ___________________________  SSN ___________________________

This field will be secured and concealed in the financial system.

Responsible Cost Ctr ___________________________  Cost Ctr Name ___________________________

Preparer ___________________________  Phone # ___________________________

Traveler’s Email ___________________________  Date of Birth: ___________________________

Travel Dates ___________________________  Beginning Date ___________________________  Ending Date ___________________________

Type of Action  ☐ Record a Guest Traveler

POSITION AND PERSONAL DATA

Position Number: ___________________________

Residence Status: ☐ U.S. Citizen  ☐ Non-Resident Alien  ☐ Permanent Resident

Nationality: ___________________________

RESIDENCE (where check will be sent)

c/o ___________________________

Street ___________________________

City ___________________________  County ___________________________

State ___________________________  Zip ___________________________

Phone ___________________________  (include area code)

Comments: ___________________________

T-24 Form  
Revised 2/22/2024

Created 2/26/2024 by Rebecca Walker beckywalker@utk.edu
TRAVEL REQUESTS

Log into
https://irisweb.tennessee.edu

Select “Requests” in the gray header header bar.

Click the “Create New Request” button.

Complete the required fields in the Request Header.

Add comments as needed (note that listing your emergency contact name and number here is a best practice).

Click the blue “Create Request” button in the bottom right corner.

Click the blue “Add” button to add estimated expenses for your travel.
Select the expense type that you want to add from the drop down menu.

This is an example of an estimated airfare expense.

Note that the only required fields are airports, dates, and amount of ticket.

Once you have entered the required information, click the blue “Save” button at top right or bottom left corners.

This is an example of an estimated lodging expense.

Note that the only required fields are City and Amount.

*If you are not attaching documentation of the lodging (name and address), you should add this in the comments field.

Once you have entered the required information, click the blue “Save” button at top right or bottom left corners.
To add attachments, click the blue hyperlink “Attachments”, then select “Attach Documents”.

Drag and drop your attachment into the window, then click the blue “Close” button at the bottom right corner.

Once you have all estimated expenses and attachments added, you can submit your report by clicking the orange “Submit Report” button in the top right corner.
Requesting a Limit Increase in Concur

Log into https://irisweb.tennessee.edu

Select “Requests” in the gray header bar.

Click the “Create New Request” button.

Click on the dropdown for “Request Type” and choose “UT Card Request”

Enter the name that is on your travel card.

Click the blue “Create Request” button in the bottom right corner.

Click the blue “Add” button.
Select “Increase/Decrease Limits”

1. Click on the field “Type of Request” and choose either “Permanent” or “Temporary” depending on your needs.

2. Enter an End Date (12/31/9999 for permanent requests).

3. Enter the last 4 digits of your card.

4. Enter the new requested limit.

Click the blue “Save” button at top right or bottom left corners.

Click the orange “Submit Request” button in the top right corner.
CONTRACTS

Helpful Links:

Contract Training: https://procurement.tennessee.edu/contract-management-training-videos/

Creating a Vendor: https://acctspayable.tennessee.edu/creating-a-vendor/

Forms (standard contract template, NCJ and IT form): https://procurement.tennessee.edu/contracts/forms/

Contract Policy: https://policy.tennessee.edu/policy/fi0420-contracts/

Accounts Payable Contact (Payment Works): ap_paymentworks@tennessee.edu

Contract Staff:

Erin Young, Contract Manager
865-974-8576
eyoung41@utk.edu

Jennifer Riley, Contract Specialist
865-974-1983
jriley26@utk.edu

Email: utkcontracts@utk.edu

Where to Start:

Does UT have a Master Agreement with the vendor?

<table>
<thead>
<tr>
<th>YES: Does the Master Agreement cover the services in the contract?</th>
<th>I DON’T KNOW:</th>
<th>NO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES: Submit a Framework Order- No contract needed</td>
<td><a href="https://procurement.tennessee.edu">https://procurement.tennessee.edu</a></td>
<td>Proceed to the next section</td>
</tr>
</tbody>
</table>

Click on the box “Purchasing Agreements” on the right side of the page.
Is the vendor in our system?
NO (OR I DON’T KNOW):

To check, log in to https://irisweb.tennessee.edu, click on the “IRIS” tab at the top of the screen, click on the hyperlink “Vendor Portal”

Once you are in the Vendor Portal, click on the box “Vendor Master Updates”

Here, you can search existing vendors and use the “New Vendors” tab to see requested vendors that are in the process of approval.

If your vendor is not in this system, use the “New Vendors” tab and click the “Send Invitation” button at the bottom of the fields on the left of the screen to invite the vendor to complete the process. (Once this is done, you will see the requested vendor in the right pane of this screen.)
YES:
Do you have a contract from the vendor?

NO:
You can use the Standard Contract as a template if the vendor doesn’t supply one. This is found here: https://procurement.tennessee.edu/contracts/forms/ and includes instructions.

YES:
Does the contract require an NCJ? (Is the contract over $10,000 with no formal bid process through the Office of Procurement?)

YES:
The Non-Competitive Justification Form can be found here: https://procurement.tennessee.edu/contracts/forms/ and includes detailed instructions. NOTE: This form should be signed by the requesting department’s approver.

NO:
You are ready to begin entering the contract into the system.

Log into https://irisweb.tennessee.edu, click on the “Other” tab, then click on the “Contract Management” hyperlink.

In the Contract System, click on the hyperlink “Submit a Contract” NOTE: You have the option to “Save as Draft” using the orange button at the top of this screen. This is very helpful if you find you are missing something necessary to complete the process (this happens often).
For the “Company Name” field, use the magnifying glass icon to search for the vendor.

Once you have located the vendor, use the red arrow at the front of the listing to import it to the contract.

Give your contract a title—a very brief description of the purpose.
Use the magnifying glass icon to search for the Account and Budget Entity.

When you find the account you need, use the red arrow at the front of the listing to import it to the contract.

Give a detailed description of the contract terms and purpose. Choose the “Contract Category”, the “Contract Type”, the “Contract Start and End Dates” using the drop-down menus.
Use the magnifying glass icon for the “Notification Name(s) field to add the requestor to the notification alerts for the contract approval process.

Click the orange “Add Requester…” button to have notifications of approval sent to you.

*FOR PAYABLE AND ZERO DOLLAR CONTRACTS: Enter the total amount of the contract in the “Payable Amount” field ($0 for “Zero Dollar Contract” Type)

Choose the “Competitive Type” from the drop-down menu.

Use the magnifying glass icon to search for a current vendor contact.

If you need to add a new contact, use the fields to add their information and click the orange “Save Company Contact” button to save the new contact.
When everything is entered on this page, click the orange “Save and Go to Next Tab” button.

On the next page, click the orange “Add New Document” button to attach the contract, NCJ and/or IT Questionnaire (if required), and any other supporting documentation.

When all documents have been attached, click the orange “Save and Go to Next Tab” button.
AMENDING A CONTRACT

When amending a contract, remember to:

- Change the “Record Type” field to “Amendment”
- Use the current date as the “Contract Start Date”
- If a “Payable Contract”, only enter the difference between the original contract amount and the increased amount for the amendment in the “Payable Amount” field. (i.e. the original contract was for $1,000 and the amendment is to increase it to $1,500 total, the new “Payable Amount” is $500 on the amendment).

SPECIFIC TO SOFTWARE

Software requires additional information in the “Contract Description” field:

- Are there terms posted on their website that you must accept? Please download and attach these with the contract entry.
- Will the vendor invoice the university?

You also need to complete the IT Questionnaire here: https://procurement.tennessee.edu/contracts/forms/ and attach the approved document to the contract entry. NOTE: this form should be signed by the requesting department’s approver.

SPECIFIC TO HOTEL/CATERING EVENTS

Hotel/Catering Contracts require additional information in the “Contract Description” field:

- Include date of event in the “Contract Title” field
- Include quote cut-off date (if applicable) in the “Contract Description” field
- Include deposit due date (if applicable) in the “Contract Description” field