

**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](mailto: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.

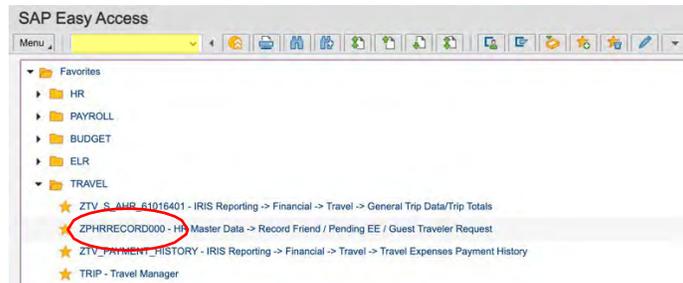
## Entering a (Non-Employee Student) Guest Traveler in IRIS

Log in to IRIS

<https://irisweb.tennessee.edu>

and use transaction

ZPHRRECORRD000 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.

The screenshot shows the 'Record a Friend/Pending Employee/Guest Traveler' form. At the top, the 'Request' button is circled in red. The form includes fields for 'Personnel no:', 'SSN:', and 'Non-Resident Alien:'. Below these are tabs for 'Actions' and 'Workflow History'. The 'Type of Relationship' section has three radio button options: 'Friend', 'Pending Employee', and 'Guest Traveler'. The 'Guest Traveler' option is selected. Each option has associated fields for 'Effective Date:' and 'Primary Position:'. The 'Effective Date:' field for 'Guest Traveler' is highlighted in yellow.

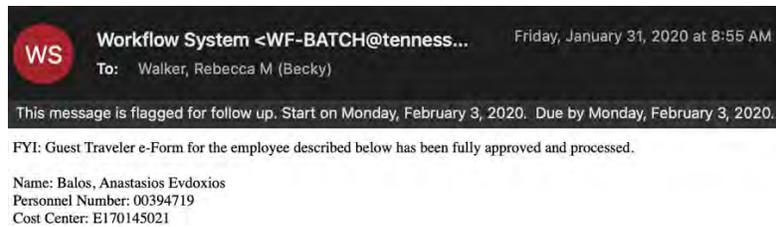
A new page will open. Fill out everything you can for the guest traveler, then scroll to the bottom of the page.

The screenshot shows the 'Record - Guest Traveler' form. At the top, there is a 'Menu' dropdown and a 'Submit for Approval' button. Below this, there are tabs for 'Request' and 'Workflow Notes'. The 'Travel Start Date' is set to 04/01/2021. The 'Personal Data' section includes fields for Title, Last Name, Middle Name, Suffix, Date of Birth, Residence Status, First Name, Designation, Known As, Marital Status, Gender (Female/Male), and Nationality (US American US). The 'Addresses' section includes a 'Permanent Residence' section with fields for c/o, Address line 1, Address line 2, City, State, Zip code, Country Key (US USA), and County code. There are also fields for Telephone number, Cell phone number, E-mail address, and Phone release. At the bottom, there are checkboxes for 'Primary Office Address' and 'Emergency Contact Address'.

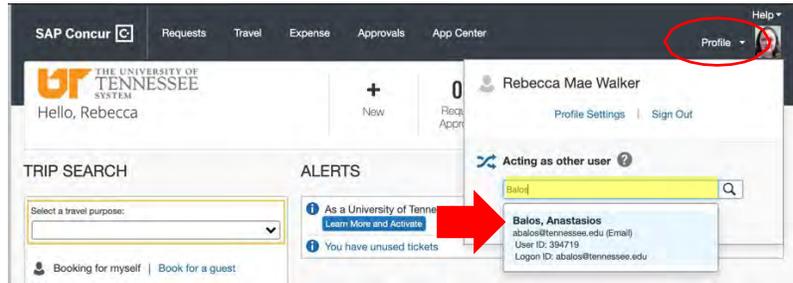
At the bottom of the page, you can change or add delegates for the quest traveler. Make sure you have selected "Non-Employee Student" at the very bottom. Once you have the delegate(s) you need, click on "Submit for Approval" at the top center of the screen.

This screenshot shows the 'Record - Guest Traveler' form with the 'Delegates for Guest Traveler' section highlighted. The 'Submit for Approval' button at the top right is circled in red. Below the delegates section, there is a section for 'Employee Grouping for Travel Expense Type' with radio buttons for 'Guest Traveler' and 'Non-Employee Student'. A red arrow points to the 'Non-Employee Student' option.

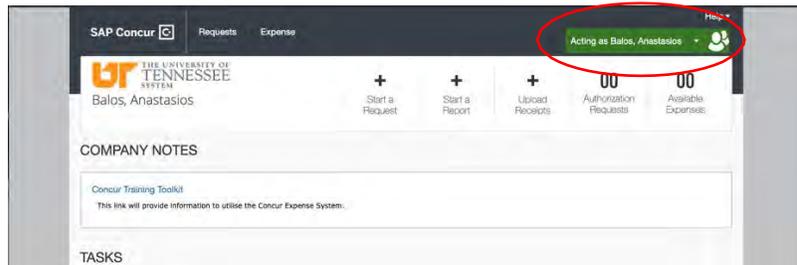
You will receive an email from IRIS once the guest traveler is fully approved. This will contain a personnel number also.



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:**

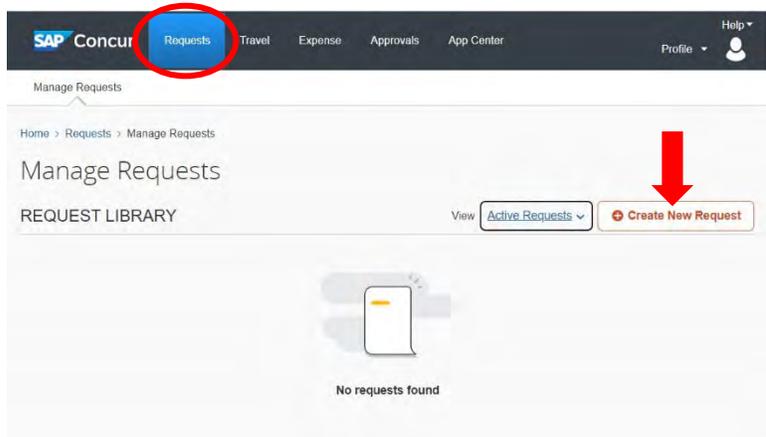
# TRAVEL REQUESTS

Log into

<https://irisweb.tennessee.edu>

Select “Requests” in the gray header bar.

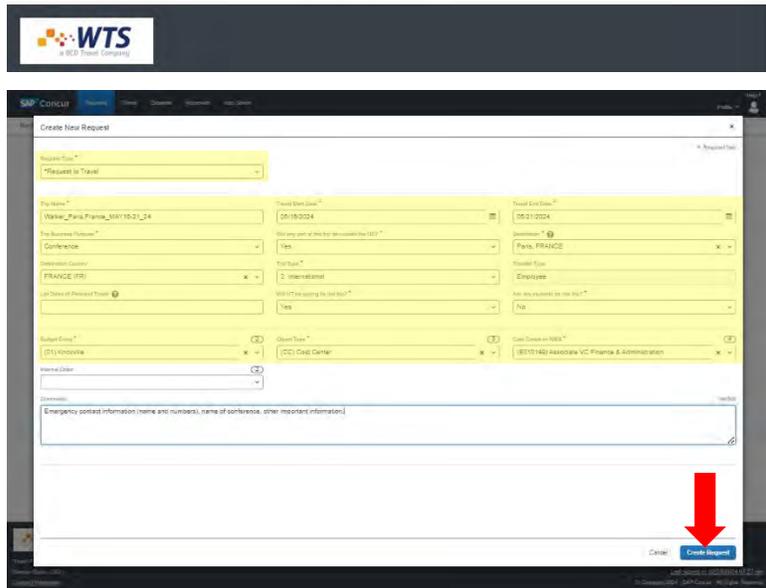
Click the “Create New Request” button.



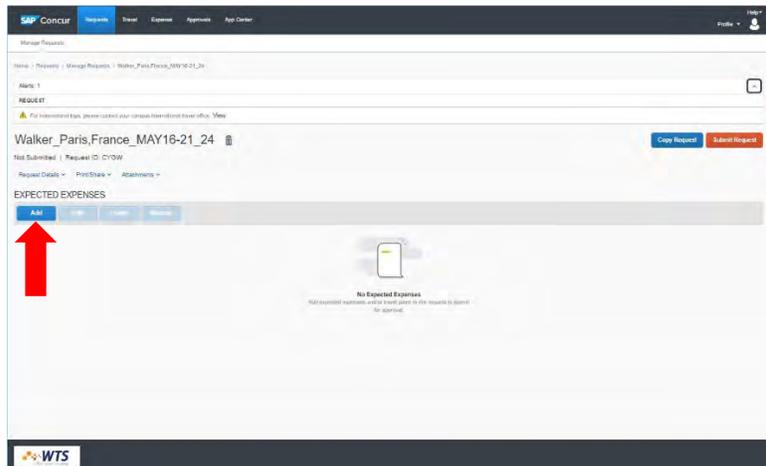
Complete the required fields in the Request Header.

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

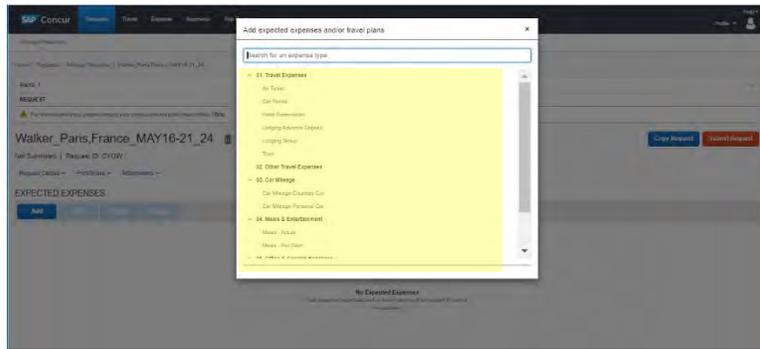
Click the blue “Create Request” button in the bottom right corner.



Click the blue “Add” button to add estimated expenses for your travel.



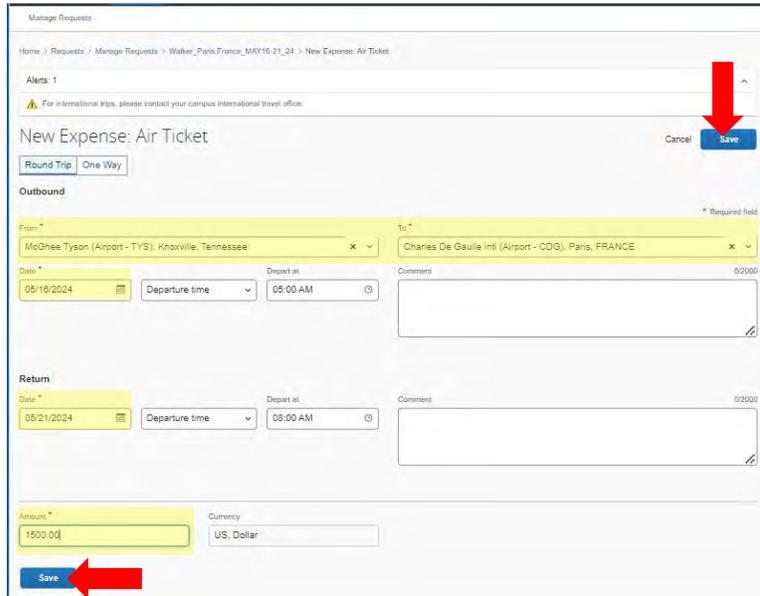
Select the expense type that you want to add from the drop down menu.



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.

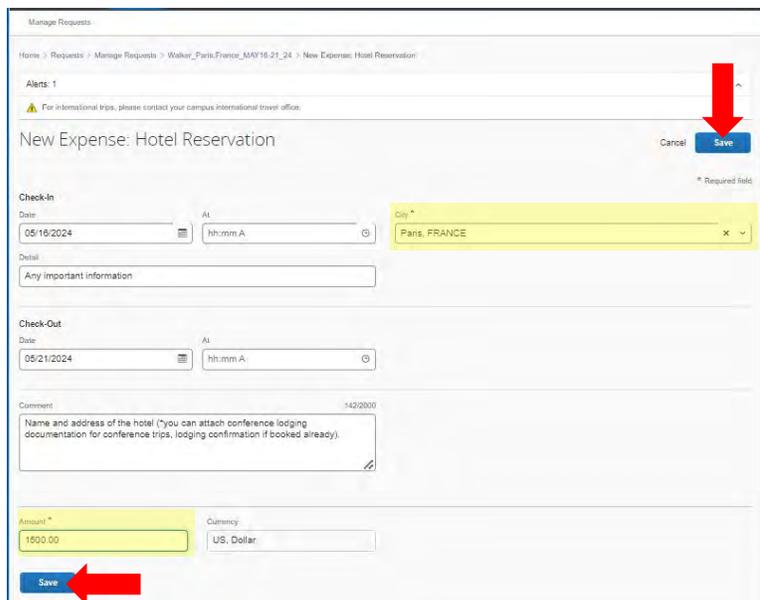


This is an example of an estimated lodging expense.

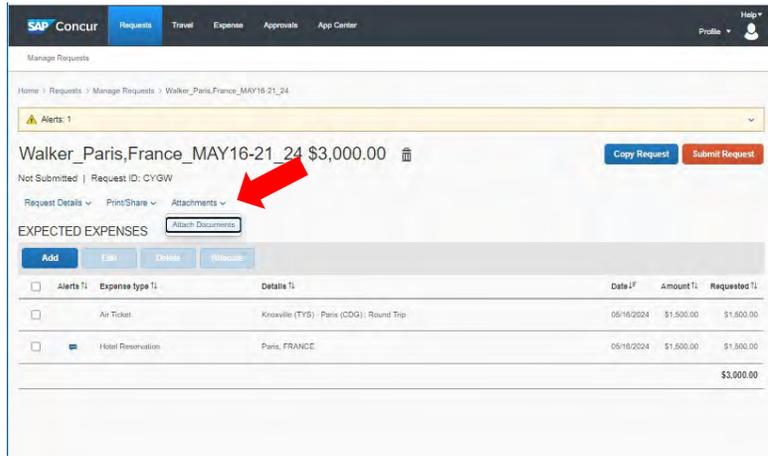
Note that the only required fields are City and Amount.

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

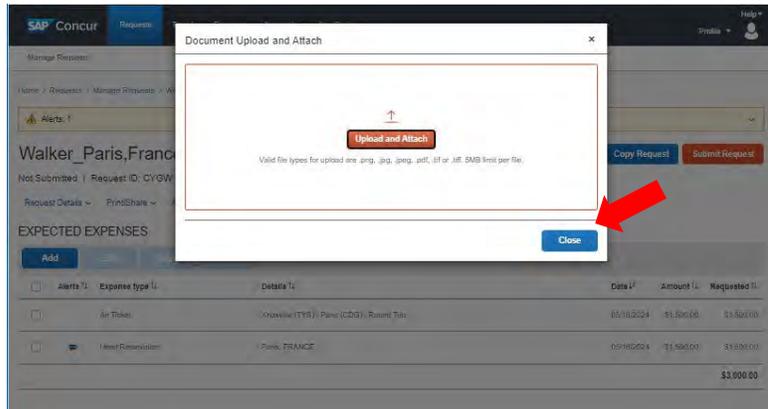
Once you have entered the required information, click the blue “Save” button at top right or bottom left corners.



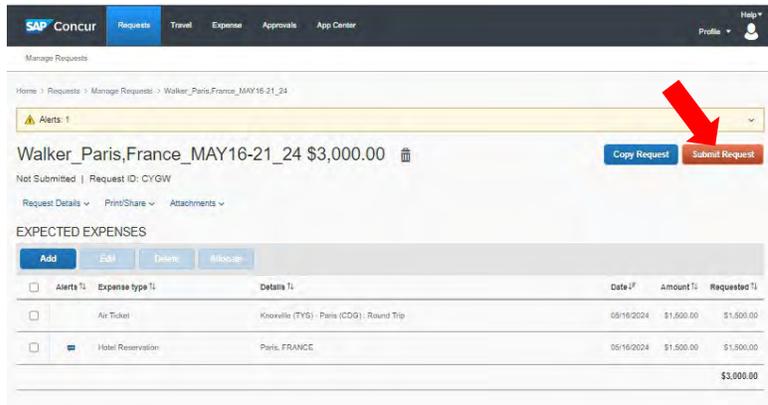
To add attachments, click the blue hyperlink “Attachments”, then select “Attach Documents”.



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.



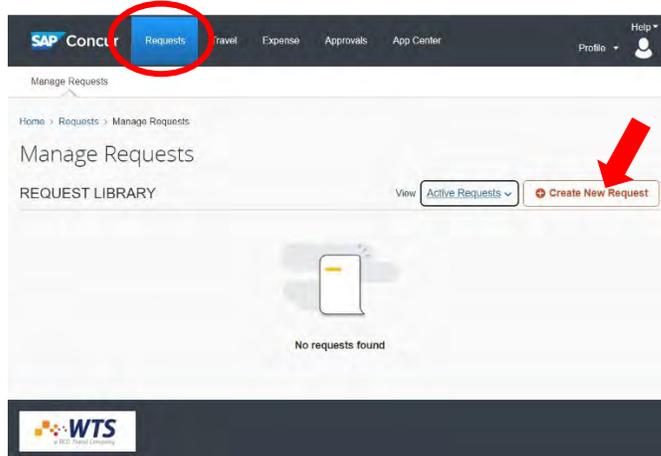
# Requesting a Limit Increase in Concur

Log into

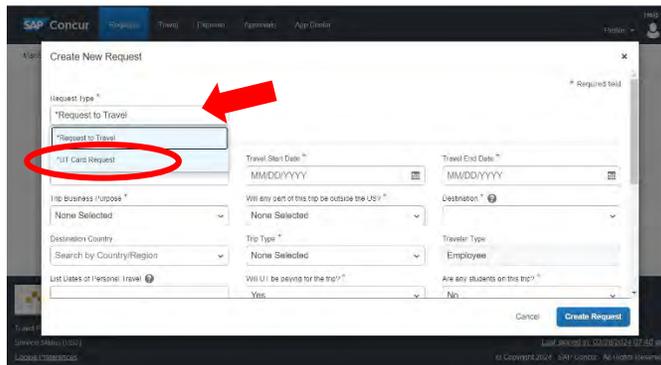
<https://irisweb.tennessee.edu>

Select “Requests” in the gray header bar.

Click the “Create New Request” button.

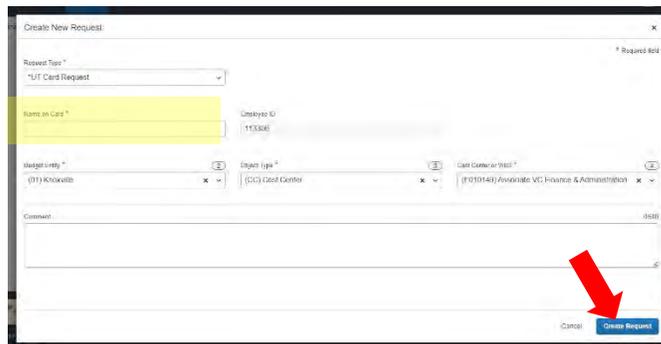


Click on the dropdown for “Request Type” and choose “UT Card Request”

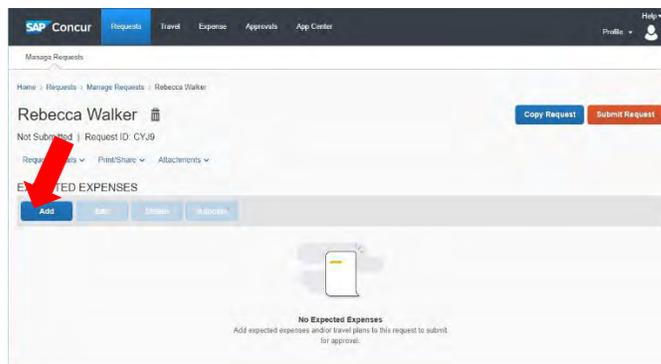


Enter the name that is on your travel card.

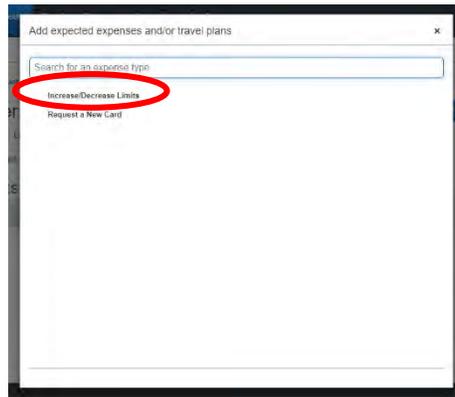
Click the blue “Create Request” button in the bottom right corner.



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.

1 None Selected

2 MM/DD/YYYY

3 Last Four Digits

4 New Credit Limit

None Selected

1 Permanent

2 Temporary

Save Cancel

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

Rebecca Walker \$50,000.00

Not Submitted | Request ID: CYJ9

Copy Request Submit Request

EXPECTED EXPENSES

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Increase/Decrease Limits		12/31/9999	\$50,000.00	\$50,000.00

\$50,000.00

## 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](mailto:ap_paymentworks@tennessee.edu)

### Contract Staff:

Erin Young, Contract Manager  
865-974-8576  
[eyoung41@utk.edu](mailto:eyoung41@utk.edu)

Jennifer Riley, Contract Specialist  
865-974-1983  
[jriley26@utk.edu](mailto:jriley26@utk.edu)

Email: [utkcontracts@utk.edu](mailto:utkcontracts@utk.edu)

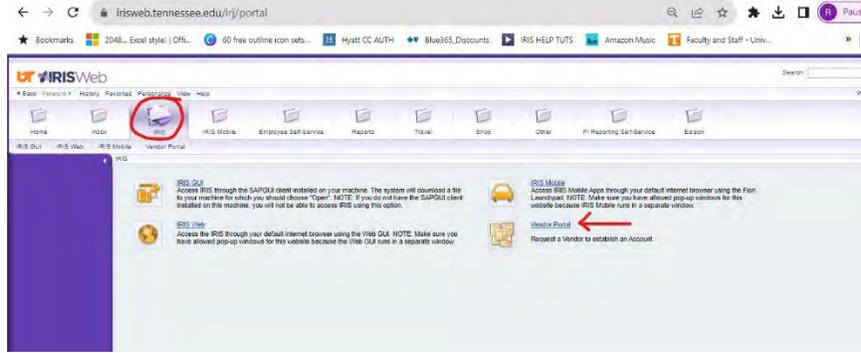
### Where to Start:

#### **Does UT have a Master Agreement with the vendor?**

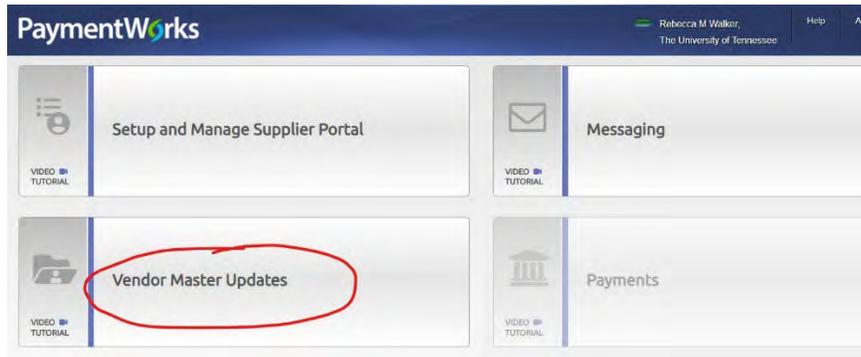
<p><b>YES:</b> <b>Does the Master Agreement cover the services in the contract?</b></p> <p><b>YES:</b> Submit a Framework Order-<b>No contract needed</b></p>	<p><b>I DON'T KNOW:</b></p> <p><a href="https://procurement.tennessee.edu">https://procurement.tennessee.edu</a></p> <p>Click on the box "Purchasing Agreements" on the right side of the page.</p>	<p><b>NO:</b></p> <p>Proceed to the next section</p>
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**Is the vendor in our system?  
NO (OR I DON'T KNOW):**

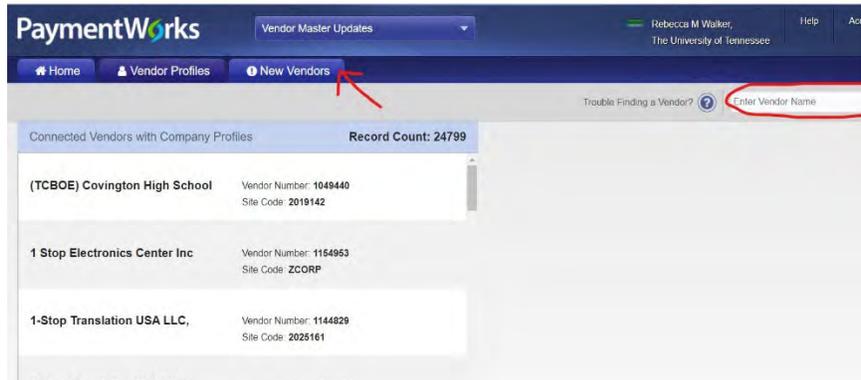
To check, log in to <https://irisweb.tennessee.edu>, click on the “IRIS” tab at the top of the screen, click on the hyperlink “Vendor Portal”



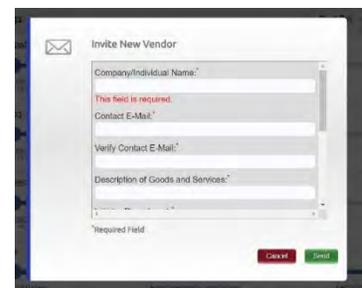
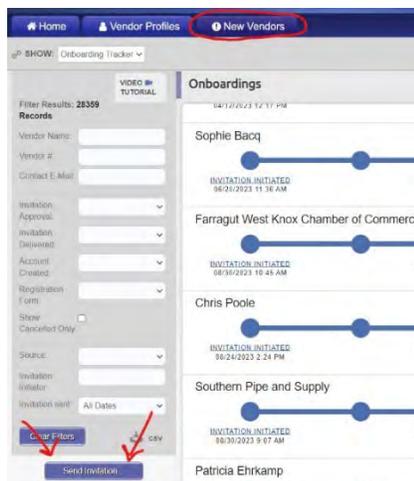
Once you are in the Vendor Portal, click on the box “Vendor Master Updates”



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:

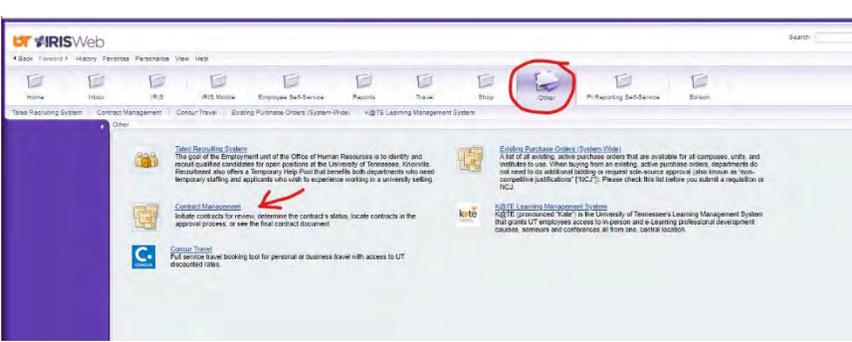
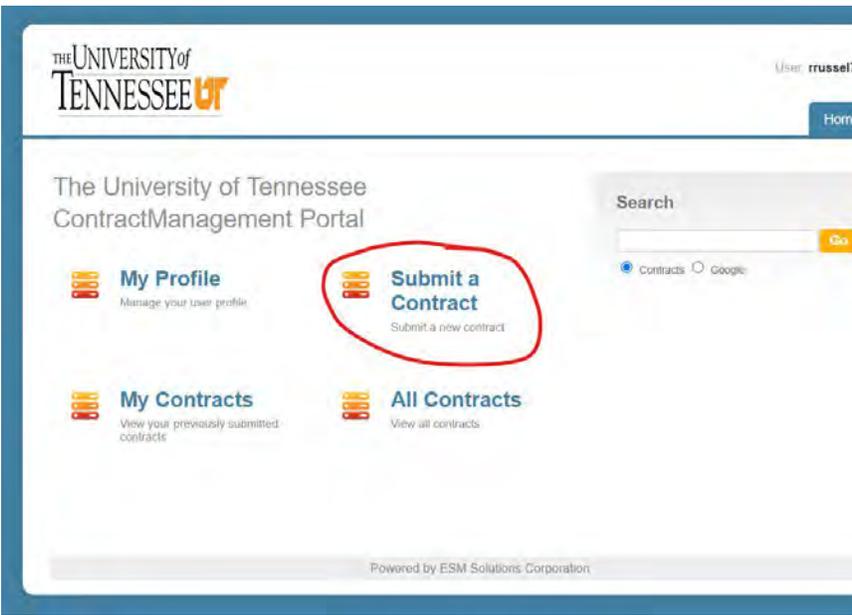
**Does the contract require an NCJ? (Is the contract over \$10,000 with no formal bid process through the Office of Procurement?)**

YES:

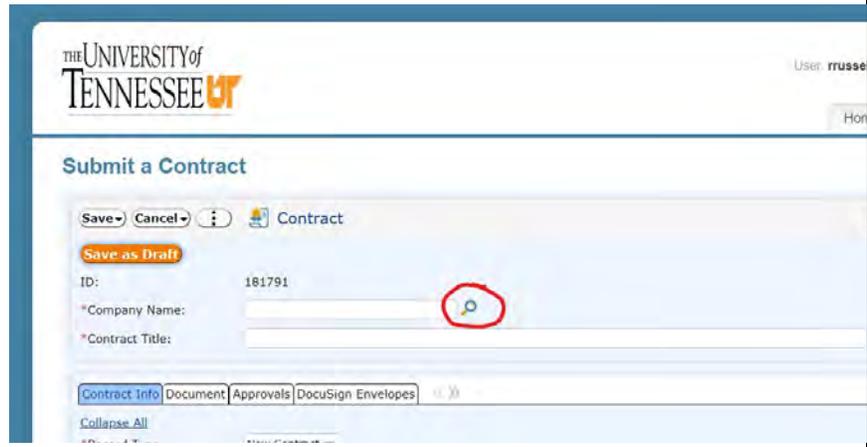
The Non-Competitive Justification Form can be found here: <https://procurement.tennessee.edu/contracts/forms/> and includes detailed instructions. NOTE: This form should be signed by the requesting department's approver.

NO:

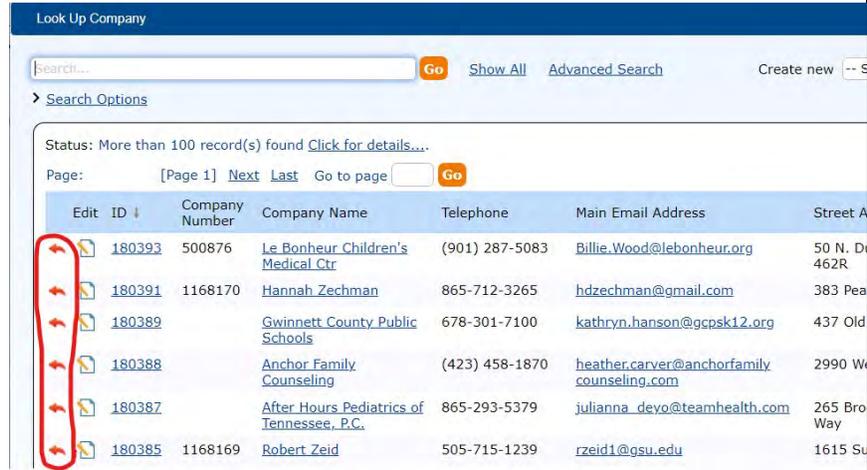
You are ready to begin entering the contract into the system.

<p>Log into <a href="https://irisweb.tennessee.edu">https://irisweb.tennessee.edu</a>, click on the "Other" tab, then click on the "Contract Management" hyperlink.</p>	
<p>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).</p>	

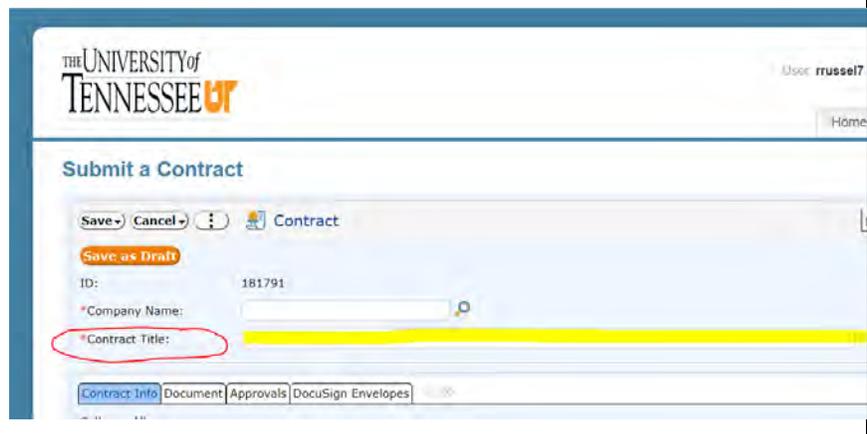
For the "Company Name" field, use the magnifying glass icon to search for the vendor.



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.

### Submit a Contract

Save Cancel Contract

Save as Draft

ID: 181791

\*Company Name:

\*Contract Title:

Contract Info Document Approvals DocuSign Envelopes

Collapse All

\*Record Type: New Contract

Fund & Budget Entity Information

\*Account:  

\*Account Name:

Funds Center Name:

Account Department Code:

\*Budget Entity:  

\*Budget Entity Name:

Contract Information

Contract Description:

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

Look Up Fund

E010149 Go Show All Advanced Search Create new -- Sel

Search Options

Status: 1 record(s) found, 1 page(s) Click for details....

Edit	ID	Fund	Fund Name	Department Code	Department Name
	16770	E010149	Associate VC Finance & Administration	U013849049	Assoc VC Finance & Admin

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.

### Submit a Contract

Save Cancel Contract

Contract Info Document Approvals DocuSign Envelopes

\*Budget Entity: 01 \*Budget Entity Name: Knoxville

Contract Information

Contract Description:

\*Contract Category: Consulting

\*Contract Type: Payable Contract

Vendor requires purchase order/department wants encumbrance: Choose one

\*Foreign Contract?: No

\*Contract Start Date: 08/30/2023

\*Contract End Date: 09/29/2023

Notification Name(s):

Add Requester Info to Notification List

Financial Information

\*Payable Amount: \$

\*Competitive Type: No Bid

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.

### Submit a Contract

Contract Description:

\*Contract Category: Consulting Contract Type: Payable Contract

Vendor requires purchase order/department wants encumbrance: Choose one

\*Foreign Contract?: No

\*Contract Start Date: 08/30/2023 \*Contract End Date: 09/29/2023

Notification Name(s):

**Add Requester Info to Notification List**

**\*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.

### Submit a Contract

Vendor requires purchase order/department wants encumbrance: Choose one

\*Foreign Contract?: No

\*Contract Start Date: 08/30/2023 \*Contract End Date: 09/29/2023

Notification Name(s):

**Add Requester Info to Notification List**

\*Payable Amount: \$

\*Competitive Type: **No Bid**

No-Bid Explanation: Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCI form. Once you complete the form, the NCI form is available at this website: <https://procurement.tennessee.edu/contracts/forms/>

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.

### Submit a Contract

Payee Named in Grant: No

\*Purchase Order Info - To be completed by purchasing

PO Number:  Date for PO:

\*Vendor Contact(s): No records.

**New Vendor Contact**

New Contact First Name:  New Contact Last Name:

New Contact Email:  New Contact Role:

New Contact Telephone:  New Contact Fax:

**Save Company Contact**

**Save and Go to Next Tab**

When everything is entered on this page, click the orange “Save and Go to Next Tab” button.

### Submit a Contract

Save Cancel Contract

Contract Info Document Approvals DocuSign Envelopes

Payee Named in Grant: No

Purchase Order Info - To be completed by purchasing

PO Number: Date for PO:

Vendor Information

Company Number: 1168154

\*Vendor Contact(s): No records. Unlink Views

New Vendor Contact

New Contact First Name: New Contact Last Name:

New Contact Email: New Contact Role:

New Contact Telephone: New Contact Fax:

Save Company Contact

Save and Go to Next Tab

Powered by ESM Solutions Corporation

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.

### Submit a Contract

Save as Draft

ID: 181791

\*Company Name: Summit Consulting Services Inc

\*Contract Title: Consulting for Kim McCulloch

Contract Info Document Approvals DocuSign Envelopes

Collapse All

Contract Documents

Contract Documents:

No records. New Views

Add New Document

Add Insurance Certificate

Add Tax Exemption

Inbound Files from Email

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

### Submit a Contract

Save Cancel Contract

ID: 181791

\*Company Name: Summit Consulting Services Inc

\*Contract Title: Consulting for Kim McCulloch

Contract Info Document Approvals DocuSign Envelopes

Collapse All

Contract Documents

Contract Documents:

No records. New Views

Add New Document

Add Insurance Certificate

Add Tax Exemption

Save and Go to Next Tab

You can add a note for approvers here.

To submit the contract, click the orange “Submit for Review” button.

The screenshot shows a web interface titled "Submit a Contract". At the top, there are buttons for "Save", "Cancel", and "Contract". Below this is a "Save as Draft" button. The form contains several input fields: "ID:" with the value "181794", "\*Company Name:" with an empty field and a search icon, and "\*Contract Title:" with an empty field. A navigation bar includes tabs for "Contract Info", "Document", "Approvals", and "DocuSign Envelopes". The "Approvals" tab is selected. Underneath, there is a "Collapse All" link and a section titled "Approval Information" which contains an "Approval Notes" text area. Below the text area are radio buttons for "edit", "HTML", and "plain text". The "Submit for Review" button is highlighted with a red circle.

## 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