Welcome!

New Ph.D. Student Guide on:

Travel & Disbursements

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School of Education Business Office
Travel & Disbursements

TEM PROFILE
- What is a TEM Profile?
- How to Create TEM Profile
- Add Arranger to TEM Profile

TRAVEL AUTHORIZATION (TA)
- What is a TA Doc?
- How to Create & Submit TA for University Business

DISBURSEMENT
- How to submit TR
- How to Approve TR eDoc for payment
Significance of TEM Profile and Arranger relationship

Employees seeking reimbursement via TEM eDocs must have or create a TEM Profile in order to be paid / reimbursed for TEM-related expenses.

Arrangers are people who have access to your TEM profile in order to help process these reimbursements.

Ensure You Are Ready to Receive a Payment on KFS

1. Create TEM Profile

1. TEM Profile has an Arranger
How to Create TEM Profile on KFS

Step 1: Go to portal.uci.edu

Step 2: At the top right hand corner, click on Login
How to Create TEM Profile on KFS

Step 3: Log in with your UCInetID and password
How to Create TEM Profile on KFS

Step 4: Click on **Finances/KFS** in the top bar.
How to Create TEM Profile on KFS

Step 5: Under Travel & Event Management, click on TEM Profile to expand it.

Step 6: Click on TEM Profile Lookup.
How to Create TEM Profile on KFS

Creating a new TEM Profile

TEM Profile Lookup

- Principal Name: [ ]
- First Name: [ ]
- Traveler Type Code: [Employee]
- Chart Code: [ ]
- Return Only my Travelers?: Yes
- Profile Id: [ ]
- Last Name: [ ]
- Primary Department Code: [ ]
- Account Number: [ ]
- Active: [Yes]

Search Clear Cancel
How to Create TEM Profile on KFS

If the Create My Profile button does not appear in the top right corner of the lookup screen, you do have a TEM profile. 

**TEM Profile Lookup**

- **Principal Name:**
  - *Kosoboy*
- **First Name:**
- **Last Name:**
- **Traveler Type Code:**
  - *Employee*
- **Chart Code:**
- **Profile ID:**
- **Primary Department Code:**
- **Active:**
  - *Yes*
- **Return Only my Travelers?**
  - *Yes*

**Search Results**

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<th>Principal Id</th>
<th>First Name</th>
<th>Last Name</th>
<th>Primary Department Code</th>
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<th>City Name</th>
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Export options: CSV | spreadsheet | XML
Clicking the Create My Profile or Edit buttons initiates a document in KFS that processes and records the addition of a new Arranger to your TEM profile.

Adding an arranger to TEM Profile for Peter Anterater

Should be very short, For example, your name
Adding an Arranger to Your TEM Profile

Scroll down to the **Arrangers** tab - you can ignore all the others - and select the magnifying glass icon next to Principal Name (UCInetID)
Adding an Arranger to Your TEM Profile

Enter the UCI netID (jhahm) or Julie Hahm to add as an arranger into the Principal Name field.
Adding an Arranger to Your TEM Profile

You will be sent back to the previous screen with your arranger's information appearing in the Arrangers tab.
Select the green Add button.
How to plan for University travel

If your PI is funding your travel expenses, you must submit a TA (Travel Authorization) on KFS.

Obtain PI’s KFS account to charge your travel expenses.

KFS account number consist of 2 letters followed by 5 number (GF12345).

Go to portal.uci.edu to submit your TA for all estimated travel expenses.

Travel Basics & Payment Options
Step 3: Log in with your UCI netID and password.
Step 4: Click on Finances/KFS in the top bar
Step 5: Under Travel & Event Management, click on Transactions to expand it.

Step 6: Click on Travel Authorization.
Expenses you should include when submitting your TA for approval

- Air Ticket
- Lodging Expense
- Conference Registration Fee
- Transportation Costs
- Meals & Incidentals (max $62/day) no exception
- Automobile Rental
- Parking Fee(s)
- Mileage
Once your TA Doc Number is Approved

Start Booking your Travel

Contact your Travel Arranger to help you with your travel arrangements

Expenses that can be directly paid by the University are:

- Air Ticket
- Lodging
- Registration Fee

Once your TA Doc Number is Approved
Rules to keep in mind while booking air travel:

- Book only coach or economy-class tickets
- A roundtrip ticket itinerary should reflect from workplace to business destination for reimbursement
- Receipt requirement: Itinerary receipt showing payment, fare class, passenger name and ticket number

Connexxus automatically includes travel insurance and has built-in guidance for compliance with UCI Travel policy

- Pay with personal credit card and submit for advance travel reimbursement
- Hold your Itinerary, and email jhahm@uci.edu for payment
- Email should include Approved TA Doc Nbr
- Held itinerary must be ticketed within 24 hours

Fly America Act: Travelers should be aware of the Fly America Act, which mandates use of U.S. air carriers

Book online with Connexxus

Booking Air Travel for UCI Business
When booking lodging, use connexxus to take advantage of UC negotiated rates

The lodging cap is $275 per night (before taxes and fees)

Hotel Folio or similar receipt with dates of stay, room charge, and taxes

No in-room charges
Meals & Incidentals

Other Considerations

Itemized receipts plus proof of payment

Alcoholic beverages are not reimbursable expense

There is a $62/day limit on reimbursement for food for travel in the 48 contiguous states (no exception to this policy)

The meal limit should not be treated as a per diem

Meal reimbursements should be limited to actual reasonable costs incurred up to the max
Submitting Travel Reimbursement

Complete Travel Form

Enter all travel expenses in the order of the expense date

Scan all your receipts as one pdf file and email to jhahm@uci.edu

How to Approve a Travel Reimbursement in Your Action List

Click on the following link to view video: http://www.accounting.uci.edu/travel/resources/how-to-approve.html
Having the proper supporting documentation will ensure a quicker reimbursement process.

To ensure that all required documents are included in your reimbursement request, please see supporting document guide.

**Supporting Document Guide**
Always comply with University Travel Guidelines and Policies

Help Me Help You

Get Paid in a Timely Manner
For Assistance, email jhahm@uci.edu
How to Create TEM Profile on KFS

• TR Check Request Form
• Mileage Check Request Form
• Ent Check Request Form
• How to Create a TEM Profile on kfs
• How to Add Arranger (Julie Hahm) while creating your TEM profile (UCI Employees only)
• How to Add Arranger (Julie Hahm) to your existing TEM profile (UCI Employees only)
THANK YOU

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