

Disapproved Trip Documents

While the Travel@IU system validates against certain contradictions and required fields, the highly varied nature of travel makes it impossible to screen against all errors electronically. As a result, many trip documents are being routed with incomplete or inconsistent information, causing the trips to be disapproved during review. This impedes reimbursements and frustrates travelers; but the mistakes can easily be avoided with the proper training.

Remember, we have a range of video tutorials available at anytime from the Training tab in the Travel@IU portal. Also, if you have not yet taken the two hour instructor-led Travel@IU course, we encourage you to contact [Travis Waugh](#) and register for the next available session.

The following instructions explain how to correct and resubmit disapproved trip documents, and how to avoid making common mistakes in the future.

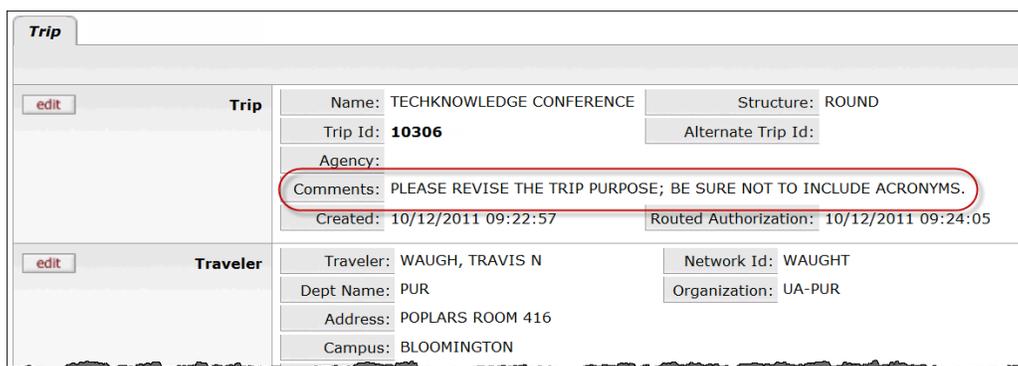
How to Handle Disapproval

Follow the steps below to revise and resubmit a disapproved trip:

1. Open the notification email, and click the **Go To eDoc** link to view your trip document. Alternatively, access the disapproved document from your Action List in OneStart.

Note: By default, a notification email is sent to the document's initiator following any disapproval. However, it is possible to turn these notifications on or off. To verify your notification settings, visit: <https://onestart.iu.edu/kr-prd/kew/Preferences.do>.

2. View the **Comments** field in the Trip section to identify the reason for disapproval.



The screenshot shows a web interface for a trip document. It is divided into two main sections: 'Trip' and 'Traveler'. The 'Trip' section includes fields for Name (TECHKNOWLEDGE CONFERENCE), Structure (ROUND), Trip Id (10306), Agency, Comments (PLEASE REVISE THE TRIP PURPOSE; BE SURE NOT TO INCLUDE ACRONYMS.), Created (10/12/2011 09:22:57), and Routed Authorization (10/12/2011 09:24:05). The 'Traveler' section includes fields for Traveler (WAUGH, TRAVIS N), Network Id (WAUGHT), Dept Name (PUR), Organization (UA-PUR), Address (POPLARS ROOM 416), and Campus (BLOOMINGTON). There are 'edit' buttons next to the Trip and Traveler sections. A red circle highlights the Comments field.

3. Any reimbursement expenses added to the original document must be entered again using the standard procedure. Verify that each section of the trip document is complete and accurate and that the original error has been corrected. When finished, click **Route for Approval**.

Note: If you are unsure how to correct the original mistake, please contact [Travel Management Services](#).

Six Common Travel@IU Mistakes

Get approved the first time by avoiding the following frequent errors:

1. Claiming Per Diem without Proof of Lodging

Proof of an overnight stay is required for processing any Per Diem claims; typically the hotel receipt or the confirmation page from Hotels.com. If the traveler stayed in a private home or as a guest in the room of another traveler, a full explanation must be provided in the “Exception to Policy” field. Be sure to include names, dates, addresses, and any related trip numbers.

2. No Mileage Record Form

When claiming mileage between multiple destinations, you must complete a mileage record form. Submit the form to Travel Management Services by creating a trip in Travel@IU. Indicate the total miles and a single ‘receipt’, then generate the trip’s coversheet and mail to the address provided. View the [Monthly Mileage Reimbursement](#) tutorial for more detailed instructions.

3. No Receipts

All reimbursements require the submission of supporting documentation to Travel Management Services; typically the original receipts. An appropriate substitute might be acceptable in certain circumstances, but you must provide an explanation in the “Exception to Policy” field. To successfully submit receipts and receive reimbursement, you must:

- Use the “Number of Receipts” field for the appropriate Reimbursement category to indicate that receipts will be provided.
- Generate the trip’s coversheet by clicking the **Generate Coversheet** button on the confirmation page (or at the bottom of an existing reimbursement trip document).
- Mail the receipts with the coversheet to Travel Management Services.

Full instructions are provided in the [Instate](#) and [Out-of-state Reimbursement](#) tutorials.

4. Inadequate Purpose

Remember, **no acronyms are allowed in the “Purpose” field**. Be sure to provide enough detail in this field that the purpose of the trip can be understood easily by individuals outside of your department, including Travel Manager Services and any potential auditors.

5. Reimbursements Not Claimed in the Correct Category

Be sure to claim your reimbursements in the appropriate expense category. For example; parking, telephone, and lodging are separate categories. Even if all three are billed on the same hotel receipt, each expense must be added in its own category. View the [In-State Reimbursement](#) tutorial for a full explanation of the required procedure, including descriptions of each Reimbursement category.

6. No Documentation for Non-Standard Mileage

The system populates the mileage to certain destinations automatically for personal car trips. If you leave this number at it appears, or revise it down, then the mileage reimbursement can be processed without any further documentation. However, if you increase the mileage or enter it yourself, you must provide a suitable means of mileage verification (ex. Google Maps). Follow the steps shown in the [Monthly Mileage Reimbursement](#) tutorial to claim miles and submit supporting documentation.

NOTE: Visit the [Travel Management Services website](#) for a full list of [common reimbursement mistakes](#).