



CEM Student Travel Guide

Please utilize this guide when preparing for student travel. For step by step planning for graduate student travel, see the table of contents below.

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Step 1:

You've just been told that you have been accepted to present at a conference. Now, you need to secure travel funding.

How much funding do you need?

Read below for how to estimate a budget for your trip.

STEP 1: REQUESTING TRAVEL FUNDS

Yay! You have been asked to present your research at a conference. Now you have to find the funds to get you there. Your first step is to

Step 1: Use any travel awards you've already received.

First, you would check to see if you have any travel awards to use. Usually these are awards given at Research Day, or maybe you've won other fellowships/awards from the Graduate School, etc. to use for travel funds.

Step 2: Reach out to your mentor

Second, reach out to your mentor and ask them if they can contribute to your travel.

Step 3: Reach out to your employing department (BDS, SACS, LACS, or other.)

Third, if you still need funds, you and your Major Professor would reach out to their department head for additional support. This is just a simple email to the department head. This email usually requires a request with detailed information regarding the travel. This would include reasoning for travel, location, who all will travel with you, dates of travel, thorough budget plan with a layout of expenses and a layout of what you already have covered, and any other important information to justify the cost and reason for travel. **See below for a budget template and example email to send to the department head. The faculty department heads are BDS: Kim Newkirk knewkirk@utk.edu, LACS: Carla Sommardahl csommard@utk.edu, SACS: Diane Hendrix dhendrix@utk.edu.** For other departments outside of CEM, consult with your mentor about who to contact. Usually you can request up to \$500, but there is no guarantee it will be approved.

Step 4: Reach out to the CEM Director, Dr. Odoi.

Fourth, if the above measures were not an option, or didn't cover enough, you can email the CEM Program Director, Dr. Odoi aodoi@utk.edu. Please copy Morgan Tolbert mtolber4@utk.edu on the email as well. You would send an email detailing the same information as described in step 3. See below for a budget template and example email to send to Dr. Odoi. Dr. Odoi can usually provide up to \$500 per academic year in travel funds for CEM students.

Step 5: Apply to the GSS Travel Awards for the remainder of your trip costs.

Last, you would apply for a GSS Travel Award. These awards are only granted once per year. The award year runs September - August. The GSS gives an average of \$300-\$700 in awards. [CLICK HERE](#) to see the deadlines for those awards. When applying for a GSS Travel Award, you will need your **mentor's netID**. Make sure to ask your mentor for this. You will need the **"department head's" netID**. For us, this is not a department head, it is Dr. Odoi, the program director. His netID is **aodoi**.

Example email for requesting additional travel funds

My abstract has been accepted for a poster presentation at **conference name**, scheduled to be held in **location** from **date** to **date**. The presentation is titled **title here**. Copies of the abstract and confirmation of acceptance are attached.

This work is a result of collaboration with several members of UTCVM, including **names here**.

Type reasons why it is important to attend. Therefore, my advisor and I think this would be a great exposure for me. Although I have applied for **amount of funds requesting through GSS** and I have other funds from **price here**, I still need additional support to offset travel costs. My total estimated budget is **\$total budget here**, and therefore I would need an additional **uncovered amount here** to be able to travel to the symposium. Please find the full budget attached to this email. Therefore, support from your office would be greatly appreciated.



Step 2:

You've secured your funds to travel. Now, you need to have a travel delegate help you process the required documents and book travel.

Who helps you process your travel request and book travel? What documents do you need to provide them?

Read below to see who processes your travel and what information they need.

STEP 2: BOOKING TRAVEL ARRANGEMENTS AND THE TRAVEL REQUEST

Who books my travel in the Concur travel system?

All travel has to be done by your **mentor's employing department**. Remember, they can only book flights and pay registration fees ahead of time IF you have secured the funds for this. They cannot book hotels ahead of time. You have to book and pay for the hotel yourself, to be reimbursed by them after the trip. There are certain rules about what can/cannot be charged ahead of time. Ex: meals are always paid for by the traveler, to be reimbursed later as a meal per diem reimbursement check. *Please go over these details with your departmental administrative contact, listed below.*

1. BDS - Elizabeth Allen - eallen6@utk.edu , or Donna Longmire longmire@utk.edu
2. SACS - Amy Van Skyhawk - avanskyh@utk.edu
3. LACS - Angie Prine aprine@utk.edu

How early do I need to request funds and set up my travel arrangements/request with my administrative contact?

1. **As soon as you know that you will be traveling**, you need to start getting together your travel funds/estimated budget. See step 1 above.
2. **Once you have those travel funds secure**, email your departmental contact to get the travel booking and request process started.

A travel REQUEST in Concur has to be submitted at least 1 week prior to travel. This request approves you to travel and use the funds for reimbursement later.

STEP 2: BOOKING TRAVEL ARRANGMENTS AND THE TRAVEL REQUEST

What information do I need to provide the administrative contact helping with my travel BEFORE I TRAVEL?

1. Travel beginning and end dates
2. Location - City, State, preference to hotel
3. Method of travel - preference to flight provider, etc.
4. Purpose of Travel (including any confirmation emails/invites to attend)
5. Itinerary, if one was given to you.
6. Any travel award letters and the account number you need to use for them. This would be the steps below. You would give them your award letter for research day, award letter from the graduate school, any emails from your major professor, department head or Dr. Odoi if you secured funds through any of those resources.
7. **Make sure to provide them with all email proofs of funds to use for the trip. If there's no email proving the funds, then they can't use it!**

How do I make the administrative contact a "travel delegate"?

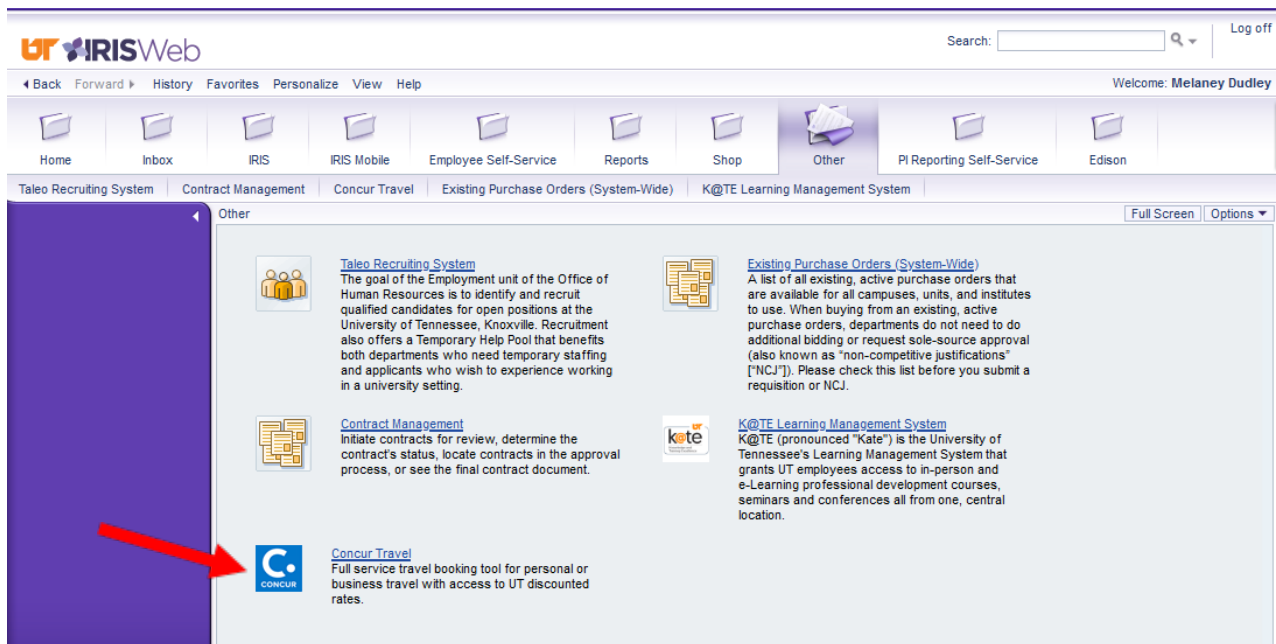
In order to have someone help you submit your travel request, you must make them a travel delegate in the Concur travel system. Please see the step by step process attached at the end of this document.

STEP 3: TRAVEL REIMBURSEMENT AFTER YOU TRAVEL

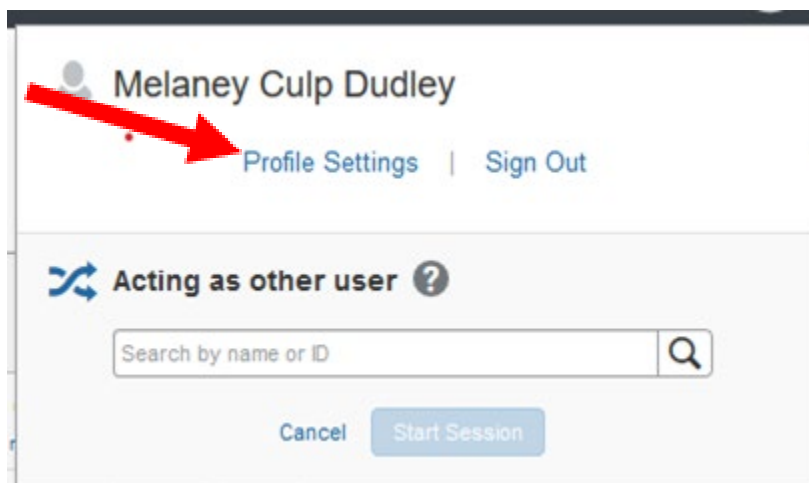
What information do I need to provide the administrative contact helping with my travel AFTER I TRAVEL?

1. After your travel is complete, you can begin submitting the expense report. This is the final request to getting your reimbursement for any items you paid for.
2. Email any receipts to your administrative contact and ask them if there's anything else they need from you in order to submit the expense report.
3. This process takes A WHILE. It can be 3-4 weeks before it is approved by the UTK Concur Travel Office. They will mail you a check to the address you have on file in IRIS. Make sure this address is up to date!
4. As stated before, make sure they have any and every document related to your travel, why you are going, receipts for items paid, and emails that state funding sources to be used.

Login to IRIS. The link to IRIS can be found on your myutk account. Once there, click Concur Travel and it should automatically load and log you in.



Once there, there will be a Profile drop down in the upper right corner. Click on that and there will be a screen that looks like the one below (it will have your name). Click on the Profile Settings just under your name and many options will appear. You can update your personal information, add credit cards, add any travel reward programs in which you enrolled, your passport, etc.



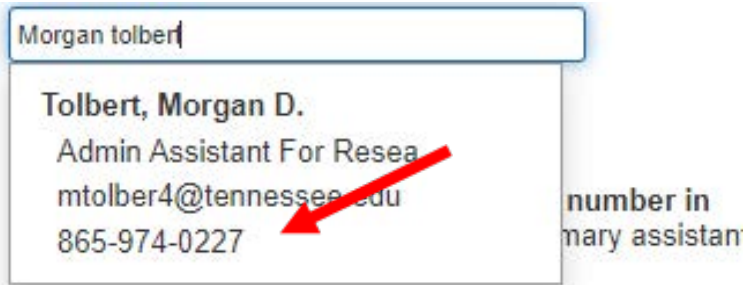
You will need to click on the “Setup Travel Assistants” tab.

The screenshot shows the 'Profile Options' page. The left sidebar contains a navigation menu with categories: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Personal Car, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Connected Apps, Concur Connect, Change Password, Travel Vacation Reassignment, Concur Mobile Registration). The main content area is titled 'Profile Options' and includes a sub-header 'Select one of the following to customize your user profile.' Below this are several sections: 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Request Preferences', 'Personal Car', and 'Concur Mobile Registration'. On the right side, there are sections for 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Change Password'. A red arrow points from the 'Company Information' section to the 'Setup Travel Assistants' link.

Once you click on the Setup Travel Assistants, you will find the Add an Assistant (see below)

The screenshot shows the 'Assistants and Travel Arrangers' page. At the top right is a 'Go to top' link. Below the header is a text prompt: 'Please select the individuals within your organization that you would like to give permission to perform travel functions for you.' There is a checkbox labeled 'Refuse Self Assigning Assistants' with a question mark icon. Below this is the section 'Your Assistants and Travel Arrangers' which contains a large empty box with the text 'You currently have no assistants defined.' To the right of this box is a red button with a plus sign and the text '+ Add an Assistant'. A red arrow points to this button. At the bottom of the page is a blue 'Save' button.

Type the name of the person that will be doing your travel documents in Concur. When you start typing their name, it should auto populate.



A screenshot of a search dropdown menu. The search input field at the top contains the text "Morgan tolber". Below the input field, a dropdown menu is open, displaying the following information for a search result: "Tolbert, Morgan D.", "Admin Assistant For Resea", "mtolber4@tennessee.edu", and "865-974-0227". A red arrow points to the phone number "865-974-0227". To the right of the dropdown menu, the text "number in" and "mary assistan" is partially visible.

Next, following the same steps as above, you will need to set that person up as an expense delegate. You will select Expense Delegates and follow those same steps as listed above. Once that is complete, your delegate can arrange travel for you in Concur.