Graduate Student Guide to Travel Funding Requests
And TravelWayne Process Intricacies

Hoping to make a few clarifications for all Graduate Student Travelers: Follow this outline!

I.   **REQUESTING TRAVEL FUNDING**
- A.   **Preliminary Request**
  - 1.   **Secure-and-fill-out GRADUATE STUDENT TRAVEL AWARD APPLICATION**
    - A.   **Complete the travel funding application found at**

      http://comm.wayne.edu/phd_forms_and_resources_.php
    - B.   **Evidence of acceptance of paper (e.g., copy of email of acceptance no**

- B.   **Submit to Dr. Kelly Young, who consults and advances it to Dr. Katheryn Maguire for approval.**
- C.   **Dr. Maguire returns to Carol with/without approval of funds. If approved, Dr. Maguire:**
  - 1.   **Signs form to approve.**
  - 2.   **Indicates the index/indices to be used to reimburse, and**
  - 3.   **The amount approved. (Could be different than what requested.)**
- D.   **Carol or Dr. Young lets you know the result.**

II.   **BEGIN TRAVEL WAYNE – Making Carol Horn an Expense Delegate & Banking Information (in particular)**
- A.   **Graduate students must be "entered into the system" on a yearly basis.**
  - 1.   **Supply Carol with your access I.D. (2 letters, 4 digits, e.g., ay7832).**
  - 2.   **Carol sends that for approval by the Dean's Office.**
  - 3.   **After a couple days, student becomes "real" in the system; Dr. Kat Maguire is the First Approver of each travel request.**
- B.   **Make Carol an EXPENSE DELEGATE: When you go into your TravelWayne from Academica:**
  - 1.   **First page: Click DOMESTIC TRAVEL**
  - 2.   **Next page: Click on PROFILE – upper right-hand corner, on the black line. (I think it becomes a blue rectangle with a person in it.)**
  - 3.   **PROFILE OPTIONS appears next. Complete form. Two things here:**
    - a.   **You will want to set up your Bank Information (left-hand column, blue lettering, fifth from top BANK INFORMATION). Set this up for your reimbursement. Watch for a "penny" to be added to your account from Concur/TravelWayne. This insures you have properly set this.**
    - b.   **Click on EXPENSE DELEGATES – (right-hand column, 2nd from bottom.**

1) Click blue rectangle, ADD. A blank rectangle will appear.
2) Type in Carol Horn, (it should populate).
3) Check all available boxes. (I can then receive e-mails.)
4) If there is anyone else there, please delete their name.
5) Click SAVE.
4. You are now ready to begin, when all good things have happened.

III. <u>MAKING A TRAVELWAYNE REQUEST</u> -- I MAKE "FOOTPRINTS" OF YOUR TRAVEL
A. So I can better understand your trip, I need all the "stuff" you have done, so right now, just remember: SAVE ALL YOUR PAPERWORK AND RECEIPTS and submit them to me as soon as you can. I can then work on this. I will need, <u>for example</u>:
1. Name/dates/location of conference
2. Conference fee
3. Index number(s) to be used: (Dr. Maguire assigns this.)
4. Travel arrangements, i.e.
   a. Airfare
   b. Baggage
   c. Mileage – I need your home address and address to where you're driving.
   d. Hotel arrangements. NOTE: When you check out, you will receive a receipt with itemizations, indicating a ZERO balance. <u>I NEED THIS DOCUMENT!!</u>
   e. Transportation Receipts – I NEED THEM ALL!!
      1. Taxi
      2. Uber
      3. Lyft
      4. Subway
      5. Train
5. Parking receipts – any-and-all receipts.
6. Food receipts/per diem requests – I need them all!!
*7. A CONFERENCE AGENDA must be provided (this can be printed from conference website. If any meal are provided by the conference, you need to let us know.)
B. I make "footprints" chronologically, from your paperwork. I date every segment.
C. With these documents, I can then enter the SEGMENTS when I start making a REQUEST in TravelWayne.
D. When we initially make the request, an identifying number/figure is assigned to each request via Concur. I put all this information on your footprint. Footprints are a "work-in-progress." I build them as information is presented.
E. When the initial TravelWayne request is complete, I push the rust-colored NOTIFY EMPLOYEE rectangle in my upper-right-hand corner of the TravelWayne page I've been working on "as you."
1. A notification goes to you.

2. You sign into TravelWayne
3. I think on the left-hand side, mid-page in a box, it will indicate "Open Requests."
4. Click on that, review it, and if it meets your satisfaction, you will click the rust-colored rectangle in your upper right-hand corner: SUBMIT.
5. This goes to Dr. Kat for her approval – in Concur/TravelWayne.
6. If Kat approves this, an e-mail will come to you, and me, indicating: APPROVED, including the amount we have estimated for the travel, based on the arrangements you have made, and given to me to upload.

IV. **AFTER YOUR TRIP – I Need Receipts!!**
A. Submit to me all your receipts and documentation – PRONTO!! 30 Days!
B. I use the footprint I have (hopefully) made prior to your trip to complete all required TravelWayne parameters to make an EXPENSE REPORT.
   1. I upload all documentation.
   2. I pray that the figures match.
   3. When it looks good:
C. I hit the rust-colored rectangle in my upper right-hand corner of YOUR page: Notify Employee.
D. When you go into your TravelWayne, there's a third box, middle, right-hand side that says OPEN REPORTS.
   1. There will be some lettering in there, probably in blue: "Ready for Review."
   2. Click on this.
   3. Review what I have provided, and if it meets your approval:
   4. Click the rust-colored SUBMIT rectangle in the upper right-hand corner of your screen.
E. With hope, all will be well with the documentation we have submitted.
   1. The Dean's Office reviews this.
   2. If okay, an e-mail will come to you, and me, saying: "APPROVED, Not Paid."
   3. Shortly, (later that day), a 2nd will come: "APPROVED, Extracted for Payment." -- THIS is the one which is our goal to see!
   4. I don't know how long it takes, but within a couple of days there should be an addition to your bank statement of the figure we have requested in your REQUEST.
   5. It would be nice if you let me know that this money has arrived safely in your account, (because that will make me feel good and that I succeeded !;)

Since this is almost as new to me as it may be to you, these directions are probably also a "work-in-progress." If you have some suggestions for improving them, I am open to them. I find going step-by-step helps me break down the process, which makes it easier at the end-of-travel.

I'm hoping with this detailed work to try and make this as painless for you as well as for myself. I'm still confused by many of TravelWayne aspects, but, with hope, this well help us all understand the process more clearly.

Happy Travels!

Sincerely,

Carol N. Horn
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