

Travel Request Review and Approval Process – Narrative

Last Modified: 08/20/2013

	Step #	Swim Lane	Step	Step Description	Requirements (Outputs)
14 Calendar days prior to Travel (5 Business days for TO COR Review)	1	Requestor (Contractor)	Submit Travel Request via email with required information <i>(suggested: minimum 14 calendar days prior to travel)</i>	The Requestor submits the <i>Travel Request</i> via email ¹ with the following required information and awaits decision: <ul style="list-style-type: none"> - Requestor Name - Request Date - Travel From & To - Departure & Return Dates - Airline / Flight # - Estimated Travel Cost - Purpose of Travel The Request should be submitted a minimum of 14 days prior to travel to minimize costs associated with booking last minute travel. ²	<ul style="list-style-type: none"> • Email with required information
	2	TO COR	<ul style="list-style-type: none"> • Review and approve Request (<i>within 5 business days of receipt</i>) • Enter travel information in Travel Log 	<ul style="list-style-type: none"> • The TO COR reviews the Request, enters the information to the Travel Log and determines whether the travel is approved. • Notification of the Approval Decision is sent via email to the Requestor. If not approved, the Travel Log entry is closed. If approved, the Travel Log entry will remain open until travel is completed and the invoice and receipts are received. 	<ul style="list-style-type: none"> • Travel Log entry is opened and notification of decision is sent to the Requestor.
	3	Requestor (Contractor)	Receive approval decision	The Requestor receives notification of the decision for travel request. If the Request is not approved, the Requestor may resubmit with additional justification.	<ul style="list-style-type: none"> • No additional action required at this time
	3a	Requestor (Contractor)	Identify Itinerary Change (IC) and submit for approval	Any change in the travel requires an Itinerary Change (IC) to be sent (via email) to the TO COR. An IC that involves a change in travel dates and/or cost requires approval from the TO COR. Note: ICs are infrequent occurrences.	<ul style="list-style-type: none"> • Notification of IC sent via email
	3b	TO COR	<ul style="list-style-type: none"> • Review IC and approve • Update Travel Log entry 	The IC is reviewed, approval notification is sent to the Requestor, and the Travel Log is updated to document the IC.	
	4	Requestor (Contractor)	<ul style="list-style-type: none"> • Travel • Keep receipts and document travel 	The Requestor completes travel ensuring to maintain a record of receipts and other documents related to the travel.	
	5	Requestor (Contractor)	<ul style="list-style-type: none"> • Notify that travel is complete • Submit receipts for invoicing 	<ul style="list-style-type: none"> • The Requestor should send notification that the travel is completed. • All receipts and associated documents are prepared and submitted for invoicing. 	<ul style="list-style-type: none"> • Notification of travel completion sent via email • Receipts and documents submitted
6	TO COR	<ul style="list-style-type: none"> • Update Travel Log entry • Await invoice with attached receipts 	<ul style="list-style-type: none"> • The TO COR updates the Travel Log to indicate that travel has been completed. • Once the Invoice with attached receipts is received (monthly), refer to the <i>Invoice Review Process</i>. 		
Follow Invoice Review Process (separate workflow)					
Any travel expenses must be submitted so that they are included with the invoice for the month in which travel occurred. Corroborative information and receipts are required.					
7	TO COR	Update Travel Log and mark completed	The TO COR updates the Travel Log with indication that Travel Receipts were received and with the file location of the Travel Documents.	The Travel Log entry is now officially closed.	

¹ All requests and decisions are communicated via email and logged manually in the current environment. Future enhancements of the *Travel Request Review & Approval Process* as well as the *Invoice Review Process* are expected to include automation of the manual processes.

² Travel requests should be submitted with enough lead time to minimize travel costs