

NEW FEATURE FOR TRAVEL SYSTEM 2.0 – ROLLING OUT ON 3/15/23

Approvers and Department Admins can now change the preparer for the reimbursement request!

How do you create a reimbursement (RB) request if the payroll preparer for a pre-approval (PA) request has left UMBC, and the traveler cannot create the reimbursement (RB)? Perhaps the traveler is not from UMBC and does not have access to the Travel System (TS). Before TS 2.0, you would need assistance from DoIT to change the preparer.

Now with TS 2.0 any approver or department admin for the department listed on the PA can create the reimbursement and choose a new preparer. (Please remember to first set the preparer up to prepare for a specific UMBC traveler. The department admin can easily accomplish that in the Profile section of the Admin page in the TS. See the section on the Department Admin role in the FAQs: [What Can a Department Administrator Do?](#))

Following are screen shots from the new user interface environment that shows how an approver or department admin can change the preparer. We are using an example PA # 2445414 “Test New Dev” to illustrate how we create the RB and choose a new preparer.

- 1) If you are an approver or department admin you will see the PA in your department in Pre-Approvals, Business Office, My Department. For this example, it is # 2445414.

The screenshot shows the 'Pre-Approval requests assigned to my department(s)' section. The table below lists the requests:

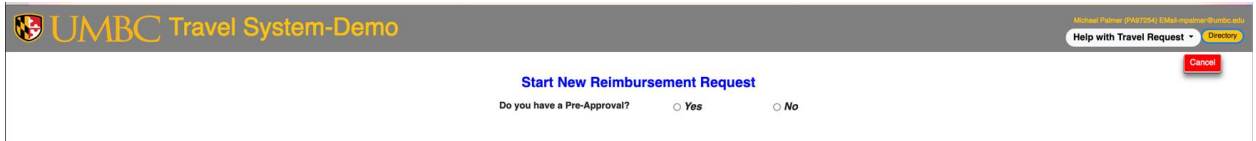
Description	Status
Test New Dev Dec 07-Dec 14 - joerl2 Kirby 2/23/2023, 3:05:12 PM	Review Nobody-2448977
Test PA for CODEIT-1 Feb 27-Feb 28 - Joseph Kirby 2/28/2023, 12:49:06 AM	Review Michael Palmer-2724133
Test New Dev Nov 26-Nov 27 - Frank Elmore(Frank Elmore Test Person) 3/3/2023, 12:58:37 PM	Travel Approved Frank Elmore-2445414

- 2) Next go to the Reimbursement button on the top of the page. And click on Create Reimbursement.

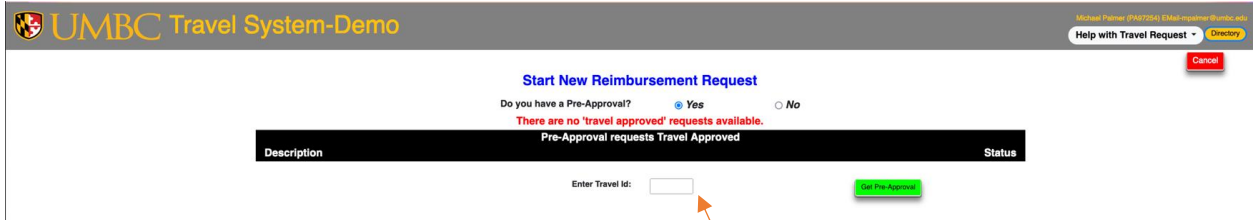
The screenshot shows the 'Reimbursement requests assigned to my department(s)' section. The table below lists the requests:

Description	Status
Remit Address Test May 23-May 27 - Julia Persell 12/21/2022, 12:19:42 PM	Review Nobody-2549097
Test Box Update Jul 05-Jul 08 - Frank Elmore 3/2/2023, 1:54:24 PM	Review Nobody-2583930

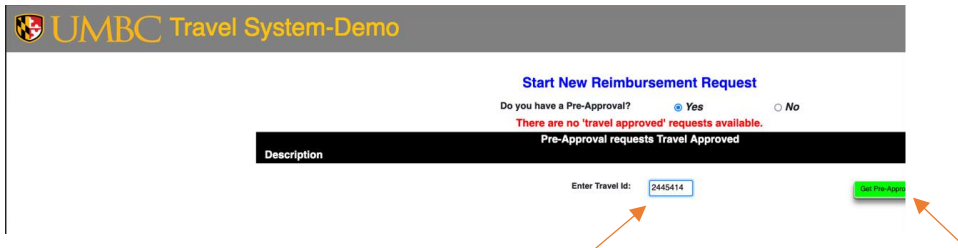
- 3) It will bring you to this screen to “Start New Reimbursement Request.”



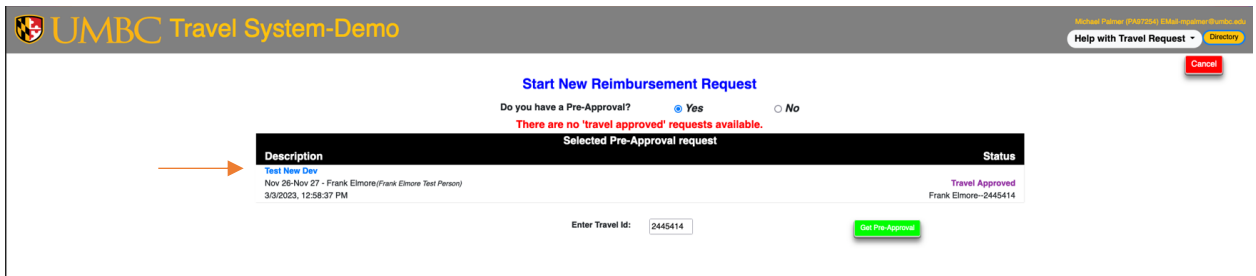
- 4) You say Yes that you have a Pre-Approval. The system will say that there are no “travel approved” requests available, but it will also open a box to enter the travel ID.



- 5) Enter the travel ID # and hit the green Get Pre-Approval button.



- 6) The TS will bring up the link for the desired PA. Click on the link.



- 7) It will create the reimbursement request in the Review status. The Preparer will be set to Nobody. Since it is in Review status, the approver or department admin can then change the preparer to someone else appearing in the drop down.

Reimbursement

Test New Dev
 Frank Elmore - Nov 26-Nov 27
 Orlando, FL
 Review-244514
 Last saved 3/3/2023, 1:33:51 PM
 Updated By-Joseph Kirby(UM80721)

Traveler: Frank Elmore (UE0271250060319\VVVVV19VVV) Preparer: Nobody

Assigned To: Nobody
 Below is the current remit address for Frank Elmore:
 7954 Helmar Drive, Apt 42
 Laurel, Maryland 20723
 USA

Yes No Is the above address correct?

Trip Title: Test New Dev
 Departure Date: 11-26-2021 (mm-dd-yyyy)

8) The PA will now change to Completed status.

Business Office My Submissions Prepared on behalf of

Assigned To: Me My Department Other Departments

Go back to Current History--Pre-Approval requests assigned to my department(s) Create PreApproval

Description	Status
Test New Dev Nov 26-Nov 27 - Frank Elmore(Frank Elmore Test Person) 3/3/2023, 1:33:36 PM	Completed Frank Elmore-244514
Test Box Update Jul 05-Jul 08 - Frank Elmore 3/2/2023, 1:54:24 PM	Completed Lynne Schaefer-2583930
Test 4 Susan #1 Feb 20-Feb 22 - jpear2 Kirby(Susan Mosko)	Completed

9) The RB request now shows in Reimbursements, Business Office, My Department in Review status, and the approvers and department admins for that department will have access to make changes.

Business Office My Submissions Prepared on behalf of

Assigned To: Me My Department Other Departments

Show History Reimbursement requests assigned to my department(s) Create Reimbursement

Description	Status
remit address test May 23-May 27 - Julia Persell 12/21/2022, 12:19:42 PM	Review Nobody-2549097
Test Box Update Jul 05-Jul 08 - Frank Elmore 3/2/2023, 1:54:24 PM	Review Nobody-2583930
Test New Dev Nov 26-Nov 27 - Frank Elmore 3/3/2023, 1:33:51 PM	Review Nobody-244514