

TM-2 PREPARER COURSE

USING NASA'S TRAVEL MANAGER SYSTEM

ADD A SPONSORED TRAVELER

This document contains the procedures for adding a non-employee Traveler. The Preparer will add the Traveler as a sponsored individual in order to create a travel authorization and voucher.

An invitational Traveler does not have access to Travel Manager, therefore a Sponsor will be assigned to the Traveler and that Sponsor can sign for the Traveler. The Sponsor's SSN is entered in the Sponsor field of the Traveler's information record on the authorization. The sponsor cannot be changed after the document is signed. The organization and default routing list of the sponsor is assigned to the invitational Traveler's record. Only the attached Sponsor has access to the Traveler's information to create documents. The sponsor can attach a different Sponsor to the Traveler's information and the initial sponsor will not have access to the Traveler's information.

The sponsor will print a hardcopy of the authorization when it has been approved and give the approved authorization to the Traveler.

A blank paper voucher (DFRC Form SF1012 "Travel Voucher" & DFRC Form 37 "Official Statement of Travel") will be given to the Traveler for completion and signature. The Traveler will send the completed voucher to the sponsor. The sponsor will create a voucher for the Traveler in Travel Manager using the paper document, and the sponsor will sign and route the Travel Manager document. The sponsor will also send the signed paper voucher with receipts to the Travel Office, according to Center policy.

TABLE OF CONTENTS

A. CREATE A NEW DOCUMENT3

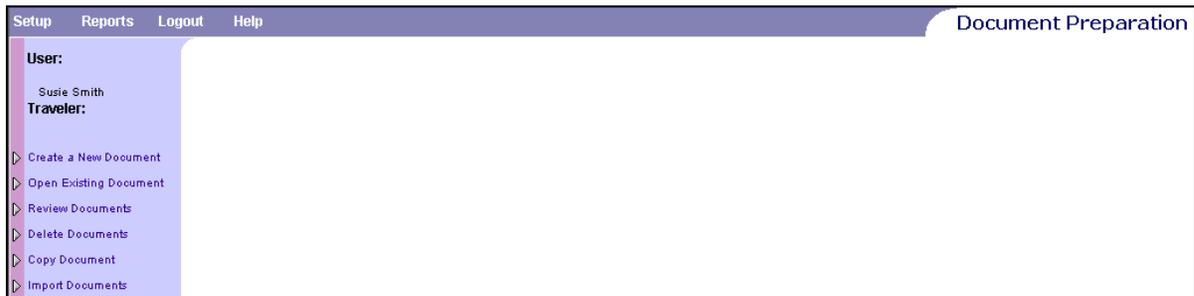
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A. CREATE A NEW DOCUMENT

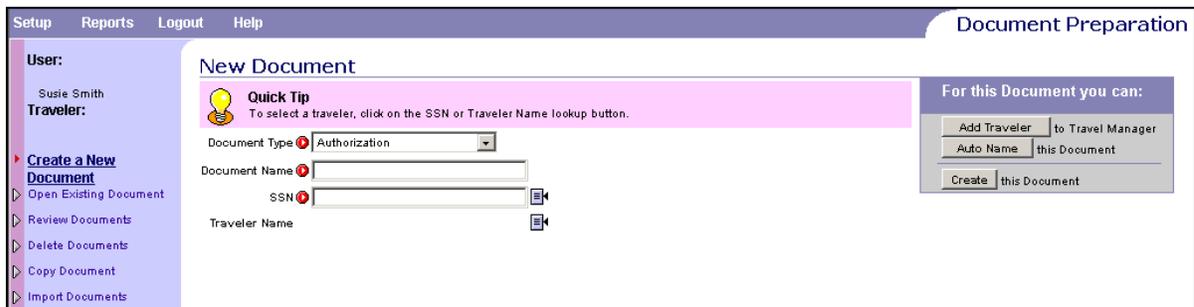
NOTE

Prior to creating a new document, the Preparer must contact the Help Desk to have the Preparer’s default routing list changed to the appropriate invitational routing list.

1. Start from the **Travel Manager Main Web** page.



2. Click the **Create a New Document** link on the Document Processing Toolbar on the left side of the page. The **New Document** page will be displayed.



3. Select **Authorization** from the **Document Type** drop down list.
4. Click in the **SSN** field and enter the Social Security Number of the sponsored invitational Traveler. Append the letter **'i'** to the end of the number to indicate **'invitational'**.

- Click the **Add Traveler** to **Travel Manager** button in the ‘For this Document you can:’ area in the top right. The **Add Traveler Information** page will be displayed.

- Enter the Traveler’s **Last Name** and **First Name** in the appropriate fields.
- Click in the **Sponsor SSN** field and enter the Preparer’s Social Security Number. This is the step that links the Preparer to the sponsored Traveler. This must be done for the Preparer to have access to the Traveler’s information to create an authorization. Use the **Lookup** icon beside the field to look up a sponsor.
- Select ‘NOT AUTHORIZED’ from the **Charge Card** drop down list under the Duty Station area.

NOTE

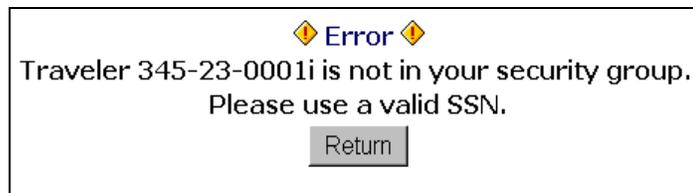
Notice the organization and routing list default to the sponsor's values and cannot be modified. It is important for the Preparer to make sure the sponsor's routing list is correct for the sponsored Traveler's document.

9. Enter the sponsored Traveler's address including City, State, and Zip.
10. Enter Preparer's e-mail address in e-mail field to receive notification of document status.

11. Click the **Apply Changes Globally** checkbox to place a '√' in the box in the 'For this Document you can:' area in the top right. This saves the information to the sponsored Traveler's permanent record.

12. Click the **Save Profile Changes** button in the 'For this Document you can:' area in the top right. The **New Document** page is displayed again with the invitational Traveler's name and Social Security Number in appropriate fields.

13. Click in the **Document Name** field and enter a name consisting of the **Center ID** (example: **24**), hyphen (-), **Org Code** (example: **XX** (2 characters)), **Date** of departure (example: **082402** (MMDDYY)) and **Traveler's Initials** (example: **JD**). Up to 14 characters can be entered. Example: **24-XX082402JD**
14. Click the  **this Document** button in the 'For this Document you can:' area in the top right to begin creating the document.
15. If the Preparer's Social Security Number was not linked as in Step 7 above, the following message will be displayed when the  **this Document** button is clicked.



16. After signing and routing the Travel Authorization, e-mail the Travel Office with the following information:
 - Sponsored Traveler's Name
 - Social Security Number
 - Document Name
 - Name of Preparer's Organization
 - How the sponsored invitational Traveler will be reimbursed
 - If by check, address must be entered in Traveler Information
 - If by Electronic Funds Transfer (EFT), an EFT form must be on file at Travel Office
17. The sponsor will sign and route the Authorization. The sponsor will be notified by the system e-mail instead of the traveler.
18. When the travel is completed, if the traveler is not at the Center, the Traveler will fill out a paper voucher DFRC 37 and SF1012 and send it to the sponsor along with the necessary receipts for the sponsor to enter the Voucher into Travel Manager. The sponsor will sign and route the Voucher in Travel Manager.

NOTE

Preparer must contact the Help Desk to have the Preparer's default routing list changed back to the original default routing list.