Travel Insurance and Registration System (TIRS)

Reviewing/Managing/Approving Applications

Version 1.0

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1   Managing Travel Insurance applications

1.1   Logging in / Accessing the System

Access the system here: https://production.dynamics.ox.ac.uk and log in with your SSO credentials.

The first time you log in, you'll see this screen: Hit the arrow next to fs.uas.ox.ac.uk and select

| idp.shibboleth.ox.ac.uk   ▼ | then log in with you SSO.

1.2   Manage an Application

In many departments, it is the Travel Administrator's role to validate all information that has been entered onto a travel insurance application before a travel manager approves or rejects and application.

If the information is complete, at least in principle, then the "Travel Administrator Validated" field should be updated in readiness for the Travel Manager to make the final approve/reject decision.

Follow the steps below to validate and / or update the status reason of an application.

Select the application to be reviewed from the home screen; 'Applications' Section (see below). Either click the traveller name or double clicking anywhere in the row of the desired application. This will open the application.

1.2.1 Review and Validate an Application

If the business process in your department requires a travel administrator to review and validate an application prior to a travel manager approving or rejecting, follow these steps.

Open the application and scroll down to the Process Management and expand. If all is as it should be, set the 'Travel Administrator Validated' to 'Yes' and save. This will send an email to the travel manager notifying them there is an application for their review.

1.2.2 Approve/Reject (or set other status reason of application)

Once the application has been validated (if required), a travel manager can approve/reject an application.

Open the desired application and scroll down to the 'Process Management' section and expand.

Set the Status Reason to the desired status. NB – only travel managers can approve or reject. Travel Administrators and Managers can set any other status reason. **Do NOT manually enter any date fields in the Process Management section. These are populated by the system when the emails are generated.

SAVE the application.

This will generate an email that will need to be sent manually. You can access the email from the dashboard (home screen), 'Emails' section. Refer to the 'TIRS – Email – Viewing an Editing' user guide which can be accessed from the TIRS project page here:
https://www.admin.ox.ac.uk/finance/insurance/travel/tirs/rollout/

1.3 TIRS Status Reason Guide:

The table below is a high level description of status reasons, how they are set and information on the email notifications:

Status Reason			Email Notifications	
SR (status reason)	Description	How SR is Set	Automatic or On Demand	To/CC
Draft	Applied automatically when the application has been created prior to submission.	System Set	N/A	N/A
Submitted	Indicates the application has been submitted.	System Set	Automatic	Traveller / Travel Administrator
Submitted for Referral	Indicates the application has been Submitted for Referral	System Set	Automatic	Traveller / Travel Administrator
Referred to Insurance Team	Indicates that the insurance team is made aware of an application that requires referral.	Travel Admin/Manager	Automatic	Insurance Team / TA and TM
Awaiting Referral Response	Indicates that the insurance team have contacted the insurance company and are awaiting a response.	Insurance Team	N/A	N/A

Referral - Insurance Available	Indicates that the Insurance team have received a response from the insurance company that insurance is available.	Insurance Team	On Demand	TA and TM
Referral - Insurance Not Available	Indicates that the Insurance team have received a response from the insurance company that insurance is NOT available.	Insurance Team	On Demand	TA and TM
Proceed to Book Travel	Indicates that the application has been returned to the traveller for the itinerary & accommodation details to be added.	Travel Admin/Manager	On Demand	Traveller / Proxy
Returned for Corrections	This status should be set by the Travel Administrator or Manager if any of the given details are incorrect or missing.	Travel Admin/Manager	On Demand	Traveller / Proxy
Approved	Indicates an application has been approved.	Travel Admin/Manager	On Demand	Traveller / Proxy
Rejected	Indicates an application has been rejected.	Travel Admin/Manager	On Demand	Traveller / TA and TM/Insurance Team (if referral)

Cancelled	Set when a previously approved trip/application has been cancelled. This can be done in the web app or CRM.	System Set (can also be set in CRM)	Automatic	Traveller / TA and TM/Insurance Team
Set for Resubmit	Status when an application requires changes and will have to be resubmitted.	**Should never be set in CRM.**	N/A	N/A