

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

then log in with you SSO.

Sign In

fs.uas.ox.ac.uk

The site that you are accessing requires you to sign in. Select your organization from the following list.



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.

Microsoft Dynamics CRM | WORKPLACE | Dashboards | Create | Tester Travel Ma... CRM UAT

SAVE AS | NEW | REFRESH ALL

Travel insurance

Applications

Active Insurance Applications

Name of Trip	Traveller	Start Date	End Date	Created On
Brittany	Zoe Domas Brittany	08/07/2018	14/07/2018	30/04/2018 14:52
Spain	Zoe Domas Spain	24/06/2018	30/06/2018	30/04/2018 14:46
Maharashtra	Zoe Domas Maharashtra	10/06/2018	16/06/2018	30/04/2018 14:21
Myanmar	Padma Jira Myanmar	22/07/2018	28/07/2018	30/04/2018 14:12
Ecuador	Padma Jira Ecuador	17/06/2018	23/06/2018	30/04/2018 14:00
Trinidad	Padma Jira Trinidad	06/06/2018	12/06/2018	30/04/2018 12:12

Status Reason by Status Reason

Active Insurance Applications

Status Reason	Count All (Status Reason)
Submitted	6

Emails

All Emails

Subject	From	To	Cc	Regarding	Priority	Status Reason...	Actual End	Crea
Travel Insurance Application TI-0000095 Brit...	Travel Insurance No-Reply			Zoe Domas...	Normal	Draft		30
Travel Insurance Application TI-0000095 Brit...	Travel Insurance No-Reply	Zoe Domas Brittany	Catherine Gannon	Zoe Domas...	Normal	Pending Send	30/04/2018 14:56	30
Travel Insurance Application TI-0000094 Spa...	Travel Insurance No-Reply			Zoe Domas...	Normal	Draft		30
Travel Insurance Application TI-0000094 Spa...	Travel Insurance No-Reply	Zoe Domas Spain	Catherine Gannon	Zoe Domas...	Normal	Pending Send	30/04/2018 14:51	30
Travel Insurance Application TI-0000093 Ma...	Travel Insurance No-Reply			Zoe Domas...	Normal	Draft		30
Travel Insurance Application TI-0000093 Ma...	Travel Insurance No-Reply	Zoe Domas Maharashtra	Catherine Gannon	Zoe Domas...	Normal	Pending Send	30/04/2018 14:45	30
Travel Insurance Application TI-0000092 My...	Travel Insurance No-Reply			Padma Jira...	Normal	Draft		30
Travel Insurance Application TI-0000092 My...	Travel Insurance No-Reply	Padma Jira Myanmar	Catherine Gannon	Padma Jira...	Normal	Pending Send	30/04/2018 14:19	30

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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.

The screenshot shows the Microsoft Dynamics CRM interface for a 'TRAVEL INSURANCE' application. The user is 'Zoe Domas Brittany'. The application is titled 'INSURANCE APPLICATION : INFORMATION' and the traveler's name is 'Zoe Domas Brittany'. The status is 'Submitted'. The 'Process Management' section is expanded, showing a table of events:

Event	Date/Time
Application Submitted email	08/05/2018 11:10
Application Approved email	--
Application Rejected email	--
Proceed to Book Travel email	--

Below the table, the 'Travel Administrator Validated' field is highlighted with a red box and is currently set to 'No'. Other fields include 'Status Reason' (Submitted), 'Reason for Rejection' (--), 'Returned For Corrections' (--), and 'Validation Comments' (--). The 'Notes' section is also visible.

At the bottom of the page, there is a status bar with 'Active' on the left and 'unsaved changes' on the right.

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.

The screenshot shows the Microsoft Dynamics CRM interface for an insurance application. The title bar includes 'Microsoft Dynamics CRM', 'TRAVEL INSURANCE', 'Applications', and 'Tightrope Walker C...'. The main content area is titled 'INSURANCE APPLICATION : INFORMATION' and 'Tightrope Walker Check if dates work'. The 'Process Management' section is expanded, showing a list of status reasons and a list of email templates. The 'Status Reason' is currently set to 'Draft'. The 'Reason for Rejection' is set to 'Draft'. The 'Returned For Corrections' is set to '--'. The 'Travel Administrator Validated' is set to 'No'. The 'Validation Comments' are set to '--'. The email templates listed are: 'Application Submitted email', 'Application Approved email', 'Application Rejected email', and 'Proceed to Book Travel email'.

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.

The screenshot shows the 'Process Management' section of the insurance application. The 'Reason for Rejection' dropdown menu is open, showing the following options: 'Proceed to Book Travel', 'Returned for Corrections', 'Approved', 'Cancelled', 'Rejected', and 'Set for Resubmit'. The 'Approved' option is selected. The 'Status Reason' is currently set to 'Draft'. The 'Returned For Corrections' is set to '--'. The 'Travel Administrator Validated' is set to 'No'. The 'Validation Comments' are set to '--'. The email templates listed are: 'Application Submitted email', 'Application Approved email', 'Application Rejected email', and 'Proceed to Book Travel email'.

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
<i>Draft</i>	Applied automatically when the application has been created prior to submission.	System Set	N/A	N/A
<i>Submitted</i>	Indicates the application has been submitted.	System Set	Automatic	Traveller / Travel Administrator
<i>Submitted for Referral</i>	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
<i>Set for Resubmit</i>	Status when an application requires changes and will have to be resubmitted.	Should never be set in CRM.	N/A	N/A