

Event Attendance and Travel – Applicant Guide

Introduction

This guide outlines the steps required to submit a request for staff event attendance and travel.

This request form is for Academic and Professional staff requesting approval to attend a conference or other work-related event or activity that requires time and/or travel away from the usual workplace and/or work duties.

This request form is not for Research and Study Leave (RSL). For further information on applying for RSL, please see [Research and Study Leave](#).

① Please note that as of 6 May 2024, the Event Attendance and Travel form is for Academic and Professional staff only. Divisions should use their current processes for students and external university representatives.

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Preparing to apply

Before submitting a request, all relevant information needs to be gathered. This includes:

- Indicative costs for travel and/or accommodation.
- Any other estimated costs (e.g. event or activity costs, insurances, etc.).
- Details of how costs will be covered, including account codes for University funded costs. Funding arrangements must be confirmed with the person(s) who has/have delegated authority over each account prior to submitting this form.
- Any relevant conference activities or ‘invitations to speak’ documents.

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- Event/activity/conference dates and itinerary details.
- Evidence that any teaching and/or research activities are being covered during the absence (written confirmation from your Supervisor/Manager).
- Any relevant approvals from external organisations (e.g., an approval from Te Whatu Ora for joint clinical staff or an invitation from another University or partner organisation).

It is expected that approval is gained **before** accepting any invitations.

Navigating to the Event Attendance and Travel Request form

The form can be accessed here:

- [Event Attendance and Travel](#)

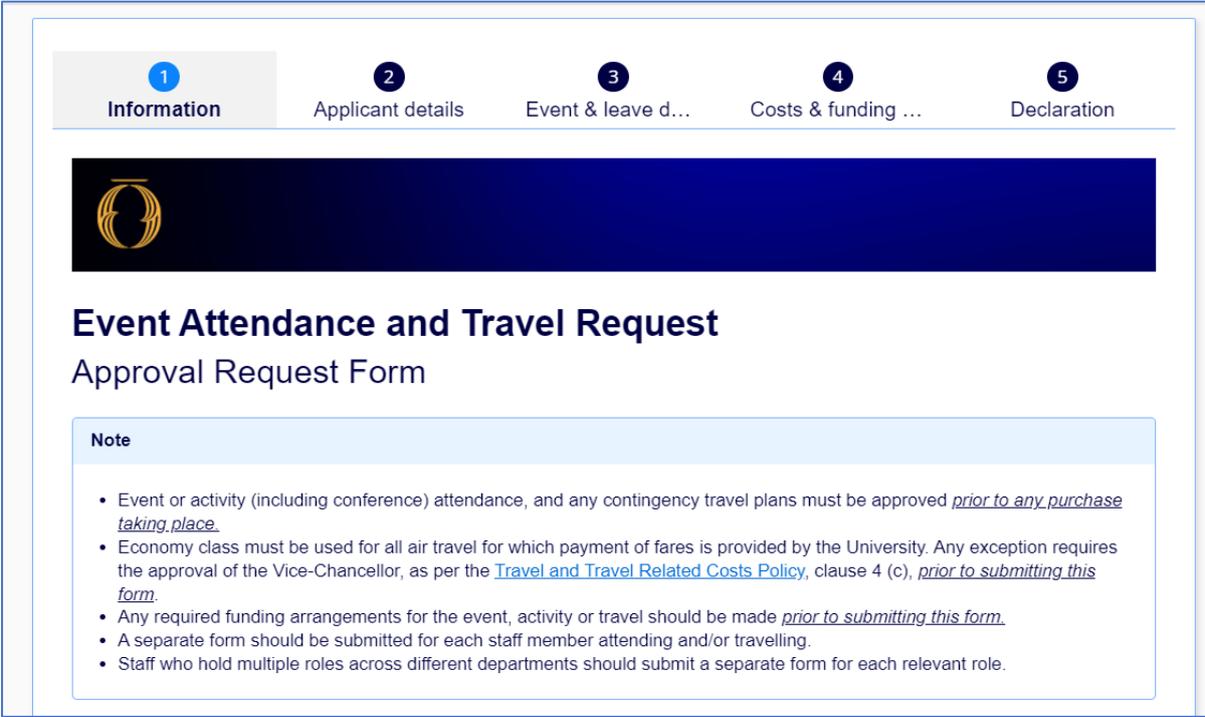
Or via the following AskOtago Knowledgebase article:

- [Request for Event Attendance and Travel approval](#)

Completing a request

There are 5 pages to the Event Attendance and Travel Request form:

- Information
- Applicant details
- Event & leave details
- Costs & funding details
- Declaration



The screenshot shows the top navigation bar of the form with five steps: 1. Information, 2. Applicant details, 3. Event & leave d..., 4. Costs & funding ..., and 5. Declaration. Below the navigation bar is a dark blue header with the University of Otago logo and the title "Event Attendance and Travel Request Approval Request Form". A "Note" box contains the following text:

- Event or activity (including conference) attendance, and any contingency travel plans must be approved *prior to any purchase taking place*.
- Economy class must be used for all air travel for which payment of fares is provided by the University. Any exception requires the approval of the Vice-Chancellor, as per the [Travel and Travel Related Costs Policy](#), clause 4 (c), *prior to submitting this form*.
- Any required funding arrangements for the event, activity or travel should be made *prior to submitting this form*.
- A separate form should be submitted for each staff member attending and/or travelling.
- Staff who hold multiple roles across different departments should submit a separate form for each relevant role.

1. Information page

Please ensure you have:

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- Familiarised yourself with the appropriate policies and procedures before submitting the form (see [Related links](#) below).
- Reviewed the information on the page.

If you are applying on behalf of another staff member, change the *Are you completing this for on behalf of someone else?* toggle to *Yes*. You will select the applicant on the next page.

Are you completing this form on behalf of someone else? Yes

2. Applicant details page

If you are applying on behalf of another staff member, start typing the name of the name of the applicant, in the *Select applicant* field.

Select the position type, position title, position employment agreement type and Division. Once the Division has been selected, the Department field will populate with dropdown options. If you see a *No data provided* message, give it a couple of seconds to load.

3. Event & leave details page

Selecting either *Event or activity (non-conference)* or *Conference*, will bring up slightly different fields to complete.

When choosing the location, *City* and *Country* fields will appear for the relevant options.

Select the start and end dates for the particular event/activity/conference.

If you have more than one event/activity/conference, select the *+ Add next event or activity* button.

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Event or activity details

Enter the details of each event or activity that you are intending to attend. Use the 'Add next event or activity' button to add each additional event or activity.

Event or activity type *

Event or activity (non-conference) Conference

Location *

Virtual (online) Local Domestic Trans-Tasman International

Start date * End date *

Name of event or activity *

Purpose of attendance *
e.g.: board member, guest speaker, external examiner, research collaboration, other (please detail)

Additional leave details section

Add details of any additional leave you are intending to take in the same trip but please remember to book this leave as per University or your Divisional processes. For example, Annual Leave needs to be booked in Staff Web Kiosk.

If you are intending to take non-standard leave, that requires higher than Divisional Head (or Deans in Health Sciences) approval, e.g., more than 10+ working days of additional leave, you should seek approval, as per the University's [Leave Delegations](#), prior to submitting this form.

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Additional leave details

Do you intend to take any additional leave (e.g. Annual Leave, RSL, Leave of Absence etc) adjacent to the event or activity? *

Yes No

Provide details of additional leave type(s) and dates *

Please ensure any and all additional leave is approved according to divisional processes and entered into the Staff Web Kiosk where applicable.

Leave and activity dates section

Enter the overall dates you will be absent from the University/your usual place of work.

Leave and activity dates

Provide start and end dates that you intend to be absent from your usual place of work. Ensure that these dates encompass **all** events or activities, travel, **and** any additional leave that you plan to take.

First date absent from usual place of work * 

Last date absent from usual place of work * 

4. Costs & funding details page

This page is made up of 3 main sections: Costs, Funding, and a section on Outstanding balances.

Costs section

These are all costs associated with the event attendance and travel request. All fields represent total amounts. For example: if attending multiple events, registration fees should be added up and the single result entered.

Supporting cost documentation, such as screenshots and indicative pricing from MTAs, can be uploaded here.

A free-text field for additional information is also available for you to provide some additional context as required.

Funding section

The following section is where you must enter details as to how the costs will be funded. The options available are:

- No funding required (fully paid for externally).
- Conference funds (academic only).
- CME funding (joint-clinical only).

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- Department funds.
- External funds (paid for externally but initially funded by Otago).
- Research project funds (e.g. P, Q, R and S accounts).

All funding details **must be confirmed** by the relevant cost centre managers **prior to submitting** this form.

If you have multiple sources of funding or require multiple account codes, you can click on *+ Add funding source* to add an additional funding source.

Outstanding balances section

All costs and funding amounts will be automatically totalled.

Outstanding balance		
<i>Outstanding balance should equal \$0.</i>		
Total costs	Total funds	Outstanding balance
\$0	\$0	\$0

This allows you to see the balance of costs versus funds and gives you an opportunity to add some detail if the funding does not balance the costs.

5. Declaration page

Review the Declaration points. These include some Division specific requirements, and some general prerequisites, such as making sure work/teaching arrangements are covered whilst away, if applicable.

1	2	3	4	5
Information	Applicant deta...	Event & leave ...	Costs & fundi...	Declaration
<h4>Declaration</h4> <ul style="list-style-type: none">• I have discussed these details with my Line Manager/Head and they approve and support this application. <i>(including Clinical Services Manager for Joint Clinical Staff)</i>• I have made arrangements so that my work and/or teaching and examination marking commitments are covered while I am away and meet departmental policy.• I have a plan for work if there are any disruptions or delays to my return that I have discussed with my Line Manager/Head.• I have made arrangements so my clinical leave is covered <i>(Sciences and Health Sciences staff only)</i>.• As part of the approval, I agree, if contacted by the Associate Dean International, to consider additional stopovers to visit our international partners on behalf of the Business School <i>(Commerce staff only)</i>.• This travel is important, and I have considered that we are trying to reduce emissions. <p><input type="checkbox"/> I confirm the above (where applicable): *</p>				

Finally, select your Head of Department/Manager who will be sent an email notification requesting their approval.

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Note: Select the staff member's personal University email rather than role-based accounts e.g. Jane Smith (jane.smith@otago.ac.nz) instead of divisional.office@otago.ac.nz

Approval
Applications with any international travel component will also be sent to the relevant Division Head for final approval.

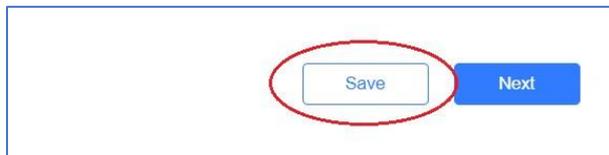
Select your HoD/Manager *



HoDs/Managers and other senior staff should use the use the one-up principle for selecting an approver. Please refer to the Conference and Event Leave Policy.

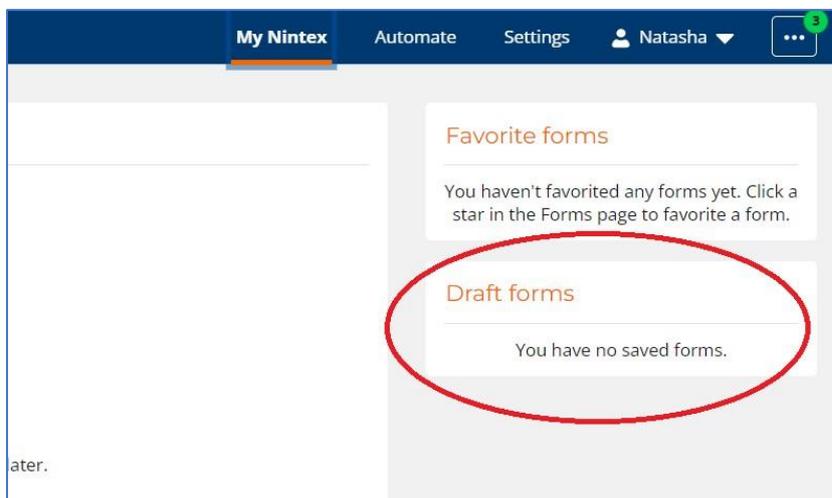
Saving the request to return to later

Select the save button, located on the bottom right-hand side of each page.



To return to a saved form, navigate to the My Nintex Dashboard:

- [My Nintex Dashboard](#)



On the right-hand side of the page, there is a section with all draft forms. Any saved forms will appear there.

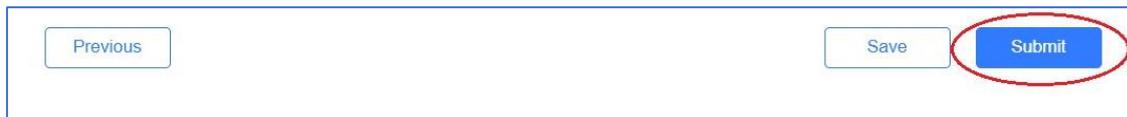
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Clicking on *Submit a form* on the left-hand side of the page will also show saved forms.



Submitting the request

Once you have completed the form, select *Submit*.



This will automatically submit the form and start an automated workflow. The application will be sent to your Head of Department or Manager, and your Divisional Head if international travel approval is required.

You will be notified of a decision by email. If your request is approved, you will receive an email outlining the next steps for booking travel, if applicable, and a Request reference number that should be used in all travel bookings (e.g., within Unimarket).

Making changes to a submitted request

If your form has been submitted, but not yet approved:

- For minor changes, such as updating the account codes or adding further context to your request, email your approver. They will be able to note these updates/changes in their approver comments field, as required.
- For major changes, such as an additional route, additional accommodation, or different class of travel, a new request form will need to be completed.

If your form has been approved and you need to make minor changes, contact your administrator. If your need to make major changes, you will need to submit a new request.

FAQS

Can the Event Attendance and Travel request form be used for students and external University representatives?

No, at this stage the Event Attendance and Travel request form is for staff only. Divisions should use their current processes for these groups.

How do I see the progress of my request?

If you submitted the request form, you can log into [My Nintex](#) with your University Credentials and go to the Form Submissions section in the left-hand navigation menu.

If another staff member submitted the request on your behalf, please contact them for assistance.

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My request is with an approver who is not available to action the request (ie. on extended or unexpected leave) what should I do?

Speak to your administrative support. They will arrange to have the request reassigned to the staff member who has responsibility for this task when the usual approver is away.

Related links

- [Travel and Travel Related Costs Policy](#)
- [Travel Planning Procedure](#)
- [Conference Leave Policy](#)
- [Sensitive Expenditure Policy](#)
- [Sensitive Expenditure Procedure and Guidelines](#)
- [Air travel and greenhouse gas emissions](#)
- [Purchase Card Policy](#)
- [Purchase Card Procedure](#)

Support

For queries relating to work-related leave and/or travel requests, please contact your administrative support.

For queries relating to the form or workflow functionality in Nintex Automation Cloud, or to provide feedback/update requests for this guide, please contact process.improvement@otago.ac.nz.