Traveler Quick Tips

Planning your travel

- Complete your profile in Concur
- Activate/register for the Receipt Store and E-Receipts. (This simplifies your expense report creation)
- Make your travel reservations in Concur:
  - Book airfare first—You can add to an airfare reservation without additional fees
  - Book your rental car—discounts are built in so you don’t need to add discount codes
  - Book your hotel—it is preferred you book in Concur. If it is necessary to book your hotel directly to obtain conference discounts, be sure to email your hotel reservation to plans@concur.com to add it to your Concur itinerary
  - Arrange for transportation to your hotel (car rental, shuttle, car service, etc.,)

Know before you go

- Review the policy and process as it relates to per diems
  - First and last days of travel receive 75 percent of the daily per diem rate. Meals marked ‘provided’ are excluded at the full value of that meal
  - Meals provided, such as conference meals or hosted meals, are to be excluded by marking them ‘provided’ when recording your per diem
- Visit gsa.gov/portal/content/104877 for per diem rates
- Review university policy and limitations
  - Airfare is limited to coach/economy for most travel. If traveling internationally eight hours or more, you are allowed business class airfare
  - Mileage reimbursement for travel to your destination is limited to the cost of round trip
  - Do not accept insurance when renting a car in the U.S. or Canada. If traveling internationally, it is recommended you purchase the insurance for car rentals
  - Receipt requirements—Itemized receipts for airfare, car rental, or lodging are always required. Other expenses of $75 or greater require receipts unless your department requires for lesser amount

While on your trip

- Take photos of your receipts with your mobile device, which will automatically be uploaded to your Receipt Store for assignment to expense reports. You need to keep your hard copies for at least one year (maybe more depending on the funding source)
- Create expense lines as you incur your expenses
- Assign expense lines to the expense report for that trip

Completing your expense report

- Claim your per diem by using your itinerary for dates of travel (import electronic itinerary or create the per diem itinerary). Answer ‘yes’ to the question “Are you including a request to be reimbursed for per diem expenses in this report?” when you begin your report
- If you received a cash advance, remember to apply the cash advance to your report. The system will prompt you if you have an open cash advance
- Remember to itemize your hotel charges. If you signed up for E-receipts, these should already be itemized if the hotel is part of the program
- PCard charges typically appear as expenses in Concur in two to three days from date of posting of charge. Do not manually create expense lines for PCard charges. You must wait until the charges are available in Concur to import
- Remember to mark ‘Personal’ any PCard charges that were personal, such as meals that are covered by per diem
- If money is owed to you, you will be reimbursed through direct deposit or check based on your payroll preferences
- If you owe money to the university, it will be deducted from your next paycheck

Important: Remember to complete your expense report within 45 days from date of travel!