Travel Office Tips when traveling for UHCL….

- ***Create a Travel Request in Concur – this is not the only step!***

  - Correct **Document ID**?
    - A combination of **Vendor ID** (without leading zeros), **destination City**, and **last day** of travel.
    - EXAMPLE: DoeJ.NewYork120524 **(No spaces or dashes)**

  - Estimated **costs**?
    - Itemize each expected expense (Hotel, Mileage, Meals, etc.).
    - Request should **not exceed amount** allowed by your manager or DBA/CBA.
      - Excess spending is not reimbursable
    - If opting for Actual meals, collect *itemized* receipts for subsequent uploading.
    - If opting for Per-Diem meals, receipts are *not* required.
    - Meals are not permitted on a Travel Card

  - Is it for a **conference**?
    - Upload a conference Itinerary.

  - Is it for **International Travel**?
    - Upload CITI Training Course Certificate.
    - Upload *signed* Embargo form.

- ***Create an Expense Report – to obtain reimbursement!***

  - **Payment Type**
    - Use "Citibank" for Travel Card charges (use expenses list).
    - Do not use "Paid by UHCL"
    - Use "Paid by Traveler" if a personal card was used.

  - **Itemized Receipts**
    - Must upload an **itemized** receipt for **every** charge (Including Travel Card Charges).
      - Excluding Meals purchased within the allowable GSA rate
  - **Mileage**
    - Use the ***Mileage Calculator***
    - Insert start and end addresses so mileage calculates automatically.

  - **Third Party Bookings**
    - Obtain itemized receipt, not mere total amount.

Please attend one of our Concur Trainings to receive in-depth information on creating Request and Expense Reports in Concur! See HR Training Calendar for dates.