<u>Travel Office Tips when traveling for UHCL....</u>

- ***<u>Create a Travel Request in Concur – Must be approved prior to Travel start date</u>***

  - Correct **Document ID**
    - <u>Last</u> Name <u>First</u> Initial<u>.</u> <u>Destination city</u> <u>Last day</u> of travel (No spaces, slashes or dashes)
    - Example: **HawkH.NewYork120525**

  - Estimated **Costs**
    - Add all Expected Expense (Hotel, Mileage, Meals, transportation, etc.)
    - Request should **not exceed amount** allowed by your manager and or CBA/DBA
      - Excess spending is not reimbursable without Department approval

    - Meal-Actuals: Up to the GSA Daily Rate – Receipts are ***<u>not</u>*** required
    - Meal-Actuals: **If** the GSA Daily Rate **is** Exceeded – Then Receipts **<u>are</u>** required for uploading
    - Meals **<u>are</u>** permitted on a Travel Card

  - For a **Conference**
    - Upload the Conference Agenda

  - For **International Travel**
    - Upload - CITI Training Course Certificate – **Must be Current**
    - Upload - **Signed**/**Approved** Embargo form

- ***<u>Create an Expense Report from the Approved Request</u>***

  - **Payment Type**
    - Apply **all** Travel Card charges (Under "Available Expenses")
    - <u>**Do not** use payment type **"Paid by UHCL"**</u>
    - Use "Paid by Traveler" only when a personal card was used

  - **Itemized Receipts**
    - Must upload an **<u>Itemized</u>** receipt for **every** charge. **Including** Travel Card Charges
    - Except for Meals (unless the Daily GSA Rate was exceeded)

  - **Mileage**
    - **<u>Must</u>** use the **Mileage Calculator**
    - Insert start and end addresses so mileage calculates automatically

  - **Third Party Bookings**
    - Obtain an **<u>Itemized</u>** receipt, not mere total amount

Please join our next Quarterly Training to receive in-depth information on what's new with Travel Procedures, creating a Request and Expense Report in Concur!