Travel Process Check List

Failure to obtain approval for any of these circumstances could result in the traveler being responsible for all travel expenses.

BEFORE YOU TRAVEL....

- The traveler must be approved to travel before any reservations are made.
- Has the traveler completed the Travel Request in Concur?
- Is the traveler approved to drive? If not, complete the VSP forms For more information, call 972-2817.
- To request a rental car, submit the Vehicle Requisition Form. For more information, call 972-3903.
- Contact your automobile insurance agent to confirm if “business use” coverage is required if driving your personal vehicle.
- Is the traveler driving more than 100 miles round trip? If so, complete the Trip Optimizer and attach to the Travel Request.
- Use the daily meal allowances on the GSA site for your destination to determine per diem.
- Use Google Maps or the Mileage Log if your destination is not available on the mileage chart. Upload the proof of mileage to the Travel Request.
- When a Travel Advance is needed, request the Advance when submitting the Travel Request in Concur. The advance request must be submitted to Travel Services **TEN** days prior to the trip start date.
- When using a Department Card for hotel reservations, contact the hotel to see if a credit authorization form is needed.

DURING YOUR TRIP....

- **Itemized receipts are required for**
  - **Student Meals**
  - **Official Function Meals(generally non-travel)**
  - **All other travel expenses.(lodging, transportation, registrations, etc.)**
    Failure to do so could result in not being reimbursed the expense or having to pay the department back for a T-Card or Department Card charge.
- Write meal tip amount on the meal receipt.

- Obtain “zero balance” hotel bill upon check-out.
- No expenses for meals or lodging will be allowing within the city or town of the employee's "official station" unless prior approval is given. The "Official Station" is the geographic location where the employee normally reports for duty

Student Groups

- All itemized receipts must be obtained for student groups **including** meal receipts.
- Students must sign a log if cash is received for meals. The log will serve as a receipt for reimbursement and should be uploaded to the Expense Report.

WHEN YOU RETURN....

- Submit an Expense Report in Concur.
- Update the expense information for each transaction.
- While receipts are no longer required for individual meals, employees should be aware of the following:
  - **Claim only your actual meal expenses**, up to the applicable per diem.
  - Do not claim the maximum per diem unless those costs were actually incurred.
  - The final reimbursement amount is at the **department’s discretion**.
  - While not required, you are encouraged to retain itemized receipts in case they are requested by management or, if traveling on a grant, by the sponsor.
- Upload the required receipts/proof of payment, conference schedule, etc. to the Expense Report. Tape small receipts securely to a piece of paper for scanning. Please do not tape over the print or highlight on the receipt.
- One employee MAY NOT include the expenses of another employee on his/her expense report.
- Include non-reimbursable expenses on the traveler's Expense Report to see a true picture of the cost of the trip.
- For international travel, use the currency converter built into Concur.
- Any portion of a travel advance that was not used must be paid back to the University immediately.
- The Expense Report must be submitted and completely approved by Travel Services within 15 working days after the trip ends. Failure to meet this deadline will result in denial of reimbursement and/or suspension of the employee's travel card.

View the Operating Procedures for more information.

Revision #4
Created 2025-09-03 19:53:42 UTC by Marcus Carlton
Updated 2026-10-29 20:17:13 UTC by Marcus Carlton