

WHAT TO KNOW BEFORE YOU GO: TRAVEL REIMBURSEMENTS

Presenter:

Meg Mitchell, Travel Services

COMMUNICATE WITH YOUR DEPARTMENT

- Do you need pre-approval to travel?
 - Are you going to a country on the travel warning list?
 - Are you required to use the Request module in Concur?
- Will you submit actual meal receipts or claim per diem meals?
- What account will be used to reimburse your expenses?

REVIEW PER DIEM RATES

- Review the GSA Lodging and Meal Per Diem Rates
 - Go to buffalo.edu/business-travel
 - In *Quick Links*, click *Per Diem Rates*
- Review Your Lodging Per Diem Rate
 - Is the conference single room rate higher than the per diem rate?
 - Print justification from conference website

GUIDELINES FOR PER DIEM MEALS

- Follow 7:00 a.m. to 7:00 p.m. Rule
 - Departure date – if you depart your home *BEFORE* 7:00 a.m., you are eligible for breakfast on that day
 - Return date – if you return home *AFTER* 7:00 p.m., you are eligible for dinner on that day
- No Reimbursement for Provided Meals
 - If you are provided a meal, you are not eligible for the per diem meal reimbursement
- No Reimbursement for Lunch
 - You are not reimbursed for lunch

REQUIRED TRAVEL DOCUMENTATION

- Purpose of Travel
 - Conference or meeting agenda, program or invite
- Flight Itinerary
 - Showing proof of payment
- Conference Single Room Rate
- Itemized Lodging Bill
 - Showing zero balance
- Itemized Car Rental Receipt
- Taxi, Uber, Lyft Receipts
- Tolls and Parking Receipts

IF TRIP COMBINES PERSONAL AND BUSINESS TRAVEL

- Provide a Price Comparison
 - Show actual dates of travel versus dates of business travel only

USE TRAVEL AND EXPENSE REIMBURSEMENT SYSTEM (CONCUR)

Submit Your Business Travel Expenses for Reimbursement

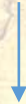
- Create a new expense report:
 - Create a travel itinerary
 - Add expenses
 - Attach receipts and supporting documentation

TRAVEL AND EXPENSE SYSTEM WORKFLOW

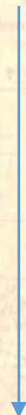
Traveler or Non-Traveler



Supervisor (Time and attendance)



Cost Approver



Sponsored Projects Services Approver
(if RF Sponsored funds)

Processor in Travel Office

TRAVEL AND EXPENSE SYSTEM TRAINING

- Sign Up for a Travel Training Session
 - Go to buffalo.edu/business-travel
- Review Tip Sheets and Videos
 - Go to buffalo.edu/travel-expense-system
- Attend a Concur Training Class
 - 2 hour class
 - Overview of travel and expense system
 - Sign up in UB *EDGE*
- Attend a Concur Lab Session
 - 1 hour session
 - Bring your questions and expense documents
 - Sign up in UB *EDGE*

TRAVEL AND EXPENSE SYSTEM SUPPORT

1. Contact Your Department Liaisons

- Your liaisons are familiar with your department processes and can assist you
- Ask your unit business office who your liaisons are

2. Review Tip Sheets and Videos

- Go to buffalo.edu/travel-expense-system

3. Contact Business Services Customer Support

- Email: ubs-travel-expense-support@buffalo.edu
- Call: 716-645-4500, press 2 for travel and expense system
- Live Chat: go to buffalo.edu/travel-expense-system and click the *Live Chat* button

ROUNDTABLE PANELISTS

- Mary Kraft, Sponsored Projects Services
- Joe Vacanti, Business Services Customer Support
- Samantha Rzeszut, Business Services Customer Support
- Cindy Paterson, UBF Accounts Payable
- Tina Mattison, UBF Accounts Payable
- Cindy Zogaria, Travel Office

THANK YOU!

