TRAVEL TIPS
&
CONCUR

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UB University at Buffalo The State University of New York

Travel Tips

During this presentation, we will discuss what every traveler should know before they go on their trip. We will discuss:

- Per diems
- Travel Documentation
- Combining personal with business travel

Concur

We will also review who is required to use Concur.

- What modules to use and when?
- Who should allocate and when?
- Workflow

COMMUNICATE WITH YOUR DEPARTMENT

- Do you need pre-approval to travel?
  - Are you lodging overnight?
  - Are you going to a country on the travel warning list?

- 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 on the Traveling for Business website, click Per Diem Rates

  - In Quick Links on the Traveling for Business website, click Per Diem Meal Allowances Breakdown

- Review the Lodging Per Diem Rates

  - Is the conference single room rate higher than the per diem rate?

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

Required Travel Documentation

- Purpose of Travel
  - Conference or meeting agenda, program, invite, etc.
- Flight Itinerary
  - Showing dates, times, fare class, 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
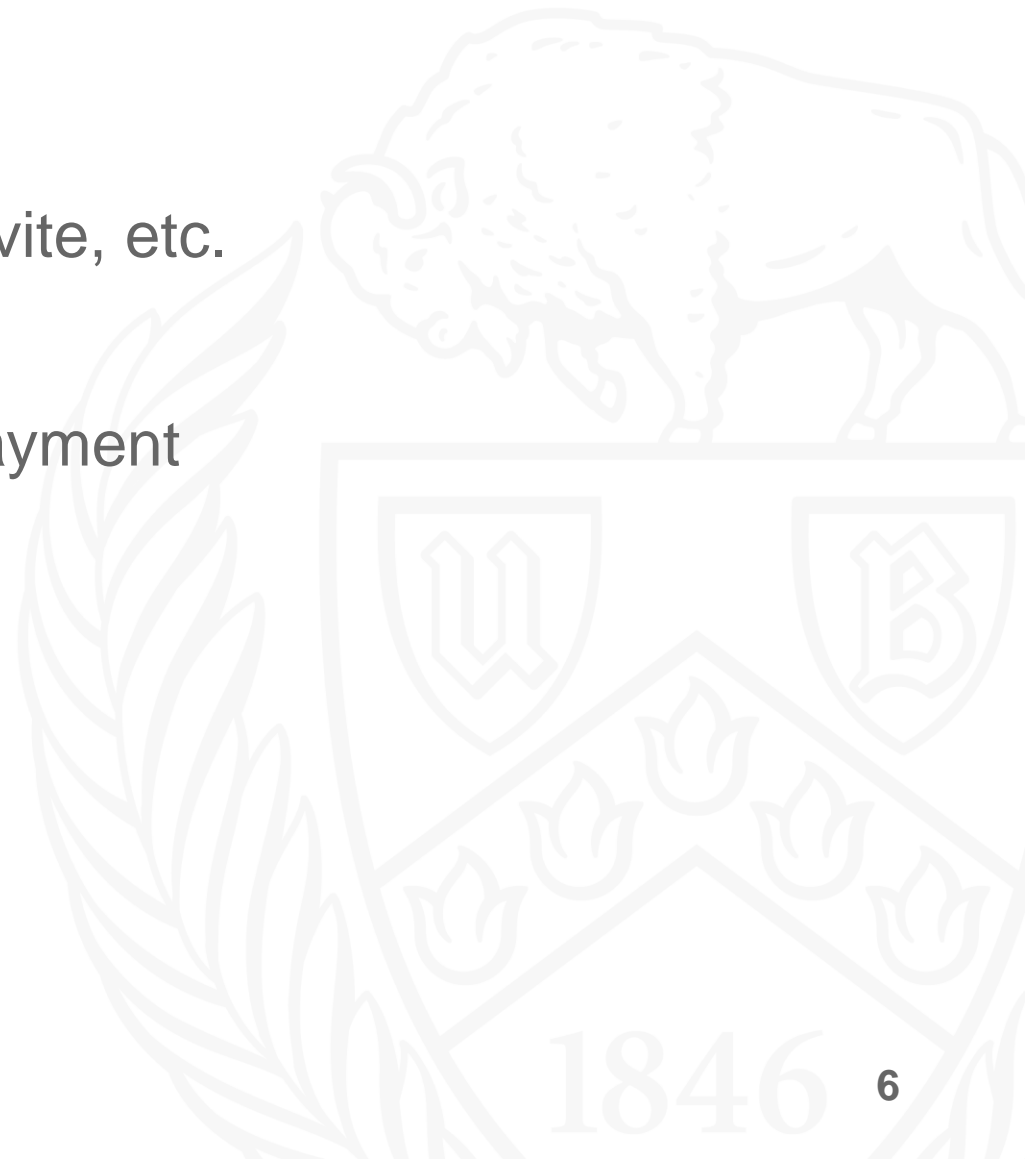
Combining Personal & Business Travel
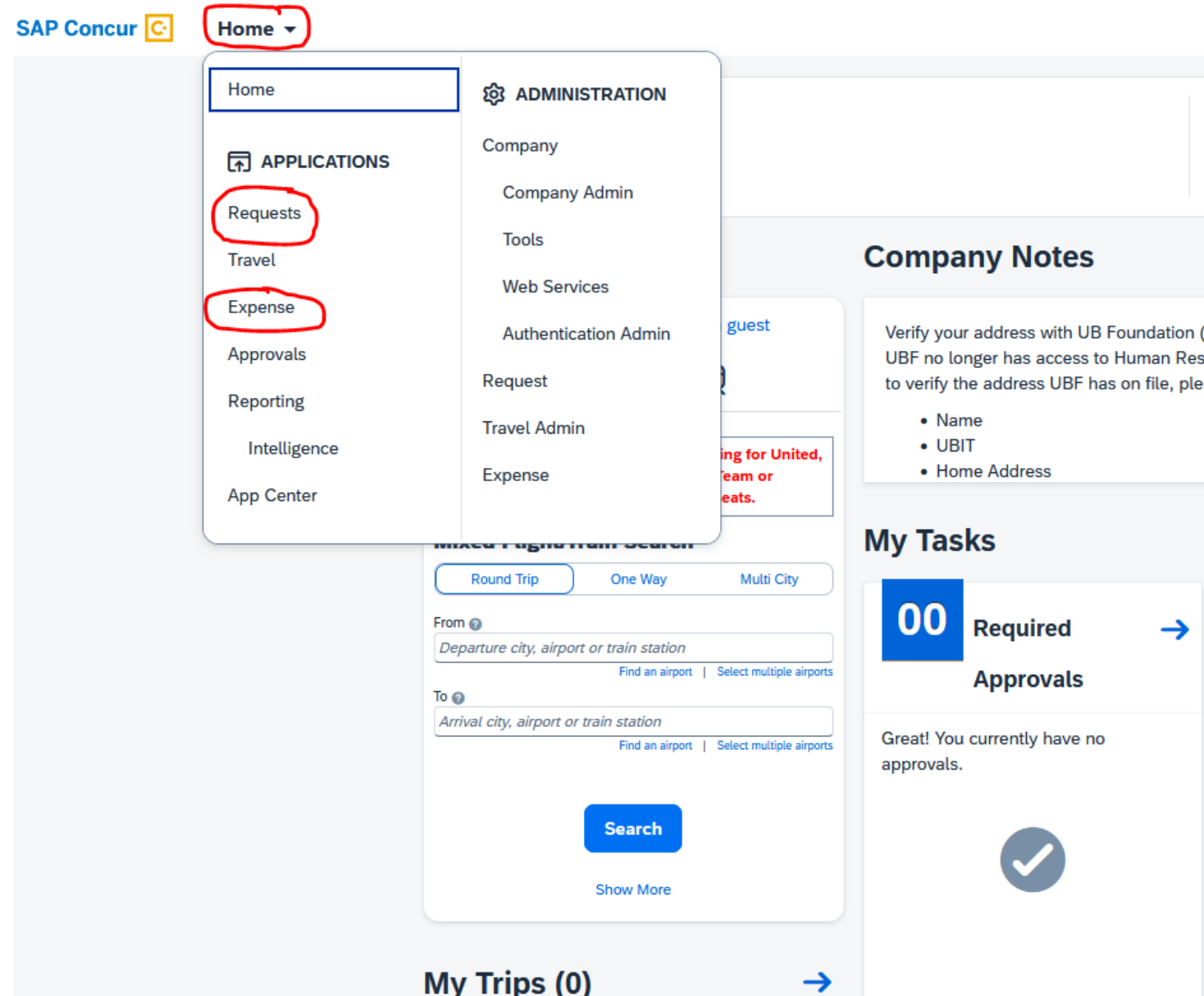
- Provide a Price Comparison
  - Flight itinerary containing UB business dates
  - Flight itinerary containing actual travel dates
  - You will be reimbursed the lesser of the two fares.
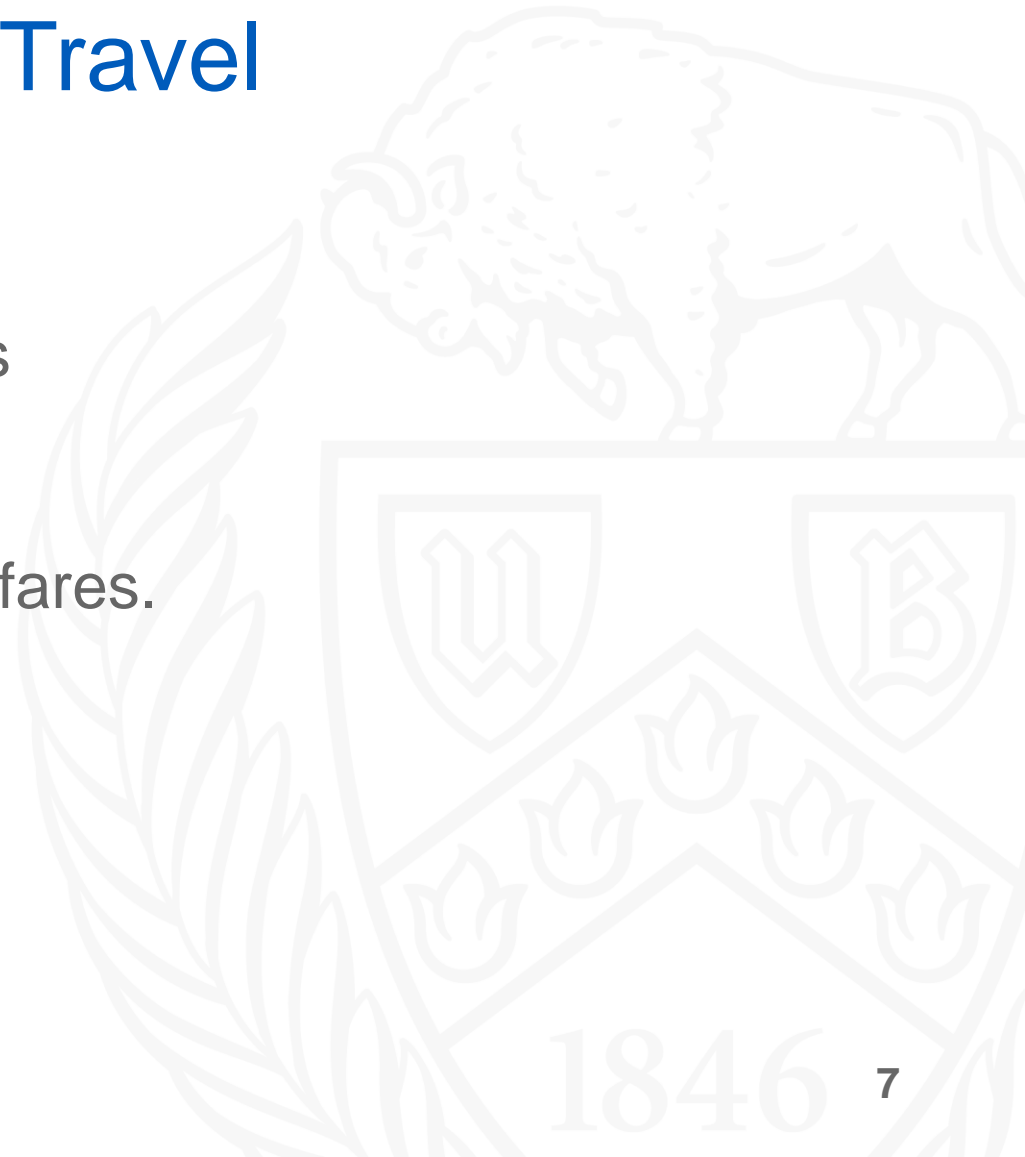
Anyone who has an active appointment is required to use the Concur system

Submit Both Request and Expense Reports in Concur.

- Before your trip, create a request report for your pre-approval.

- When you return, create the expense report from your approved request.

Travel and Expense System Workflow

Traveler or Non-Traveler

↓

Supervisor (Time and attendance)

↓

Cost Approver
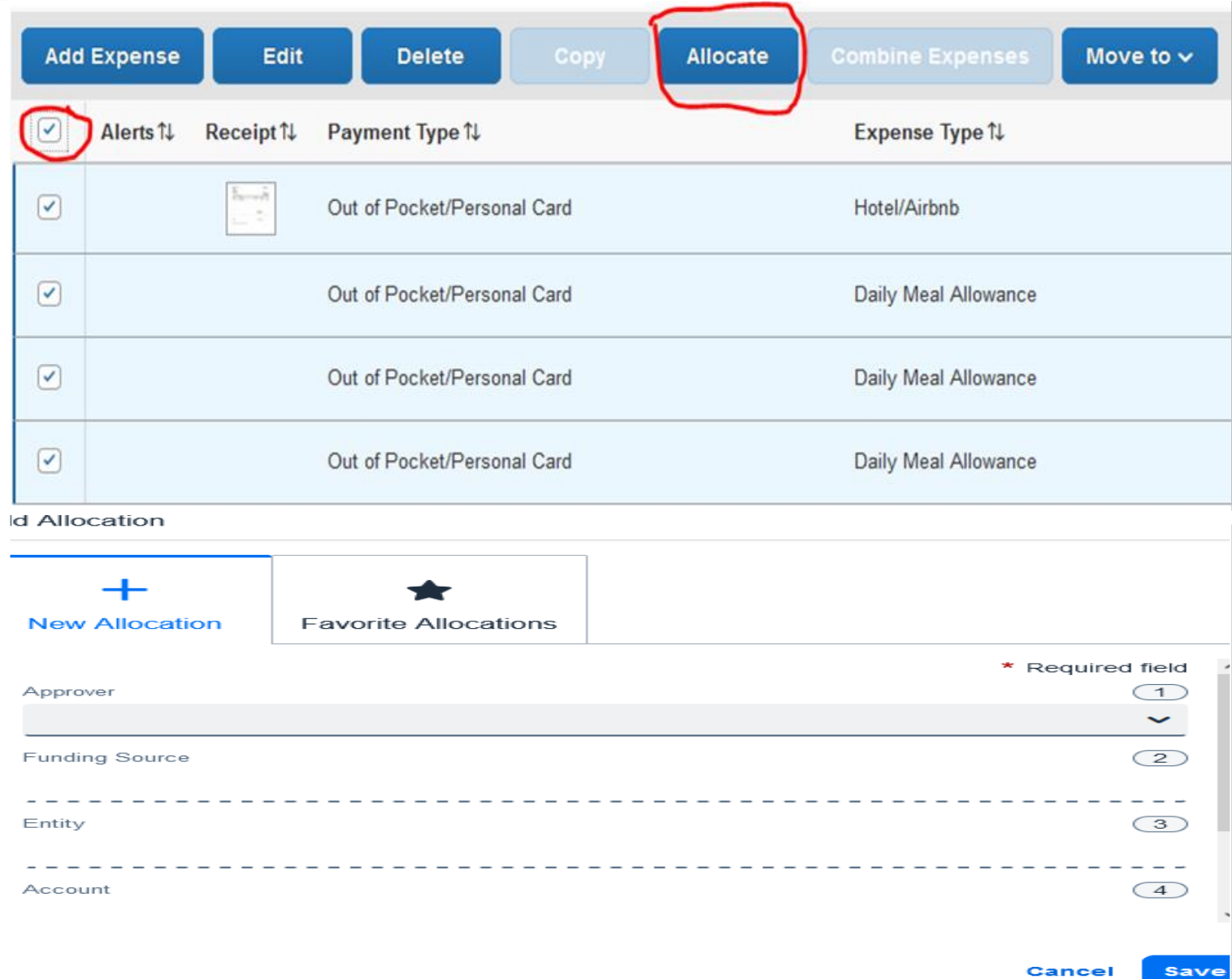
Sponsored Projects Services Approver
(if RF Sponsored funds)

Processor in Travel Office
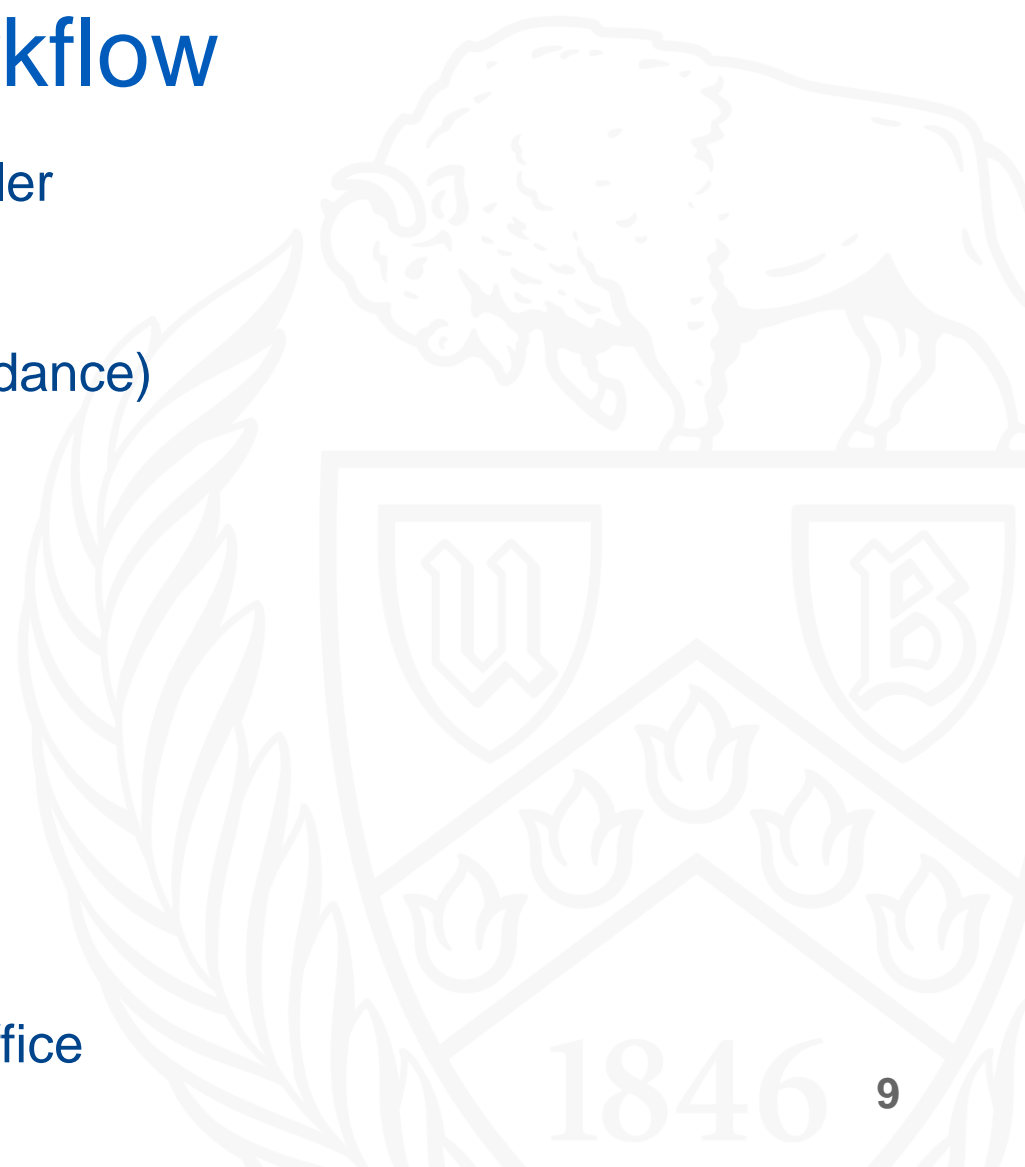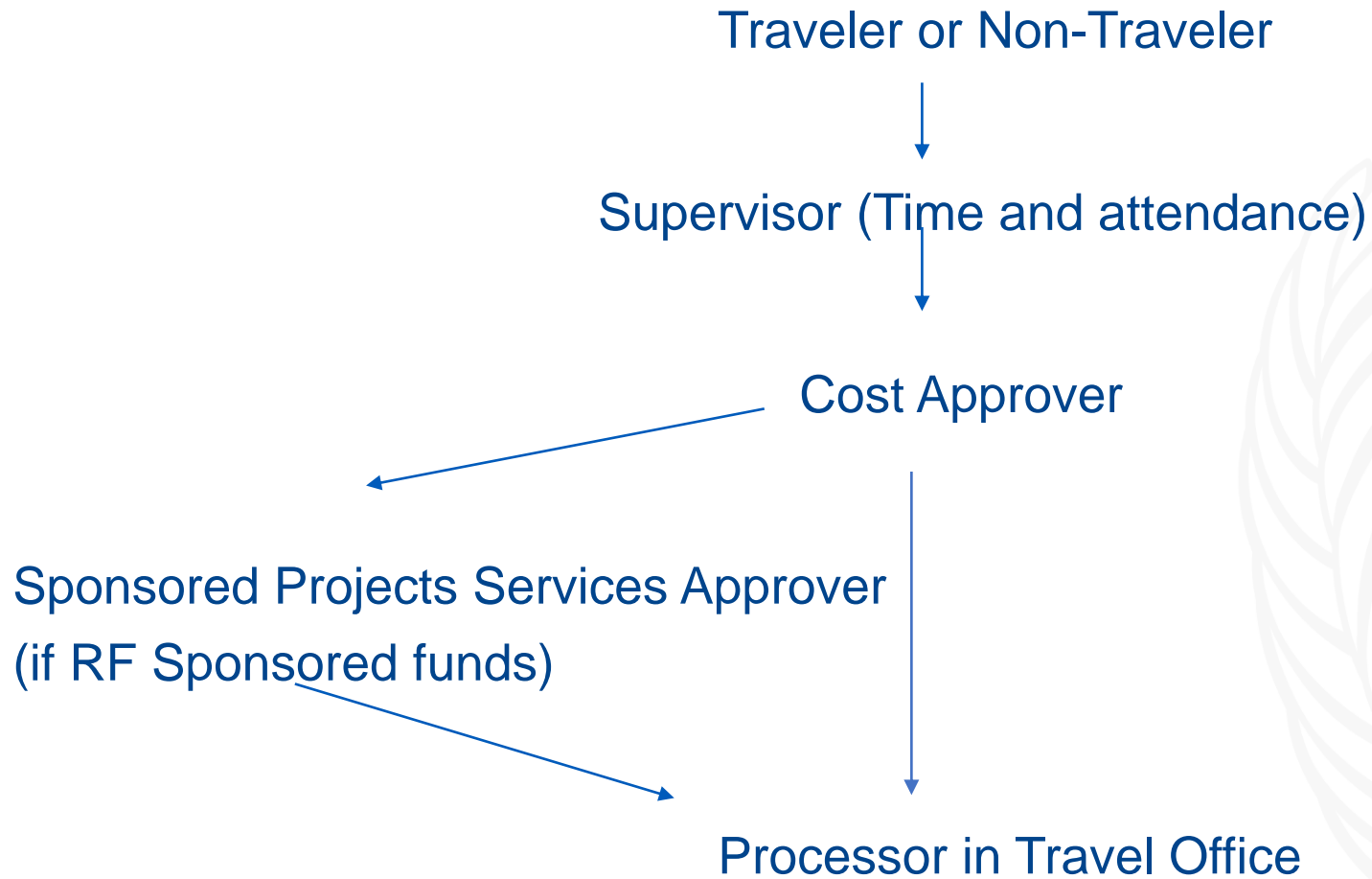
Allocate - Traveler

A traveler can allocate and add an account to their expense report.

- Check off the expenses

- Allocate

- Fill in:

  - Approver (type last name)

  - Funding Source (drop down)

  - Entity (drop down)

  - Account (drop down)

Allocate – Cost Approver

A Cost Approver can allocate and add an account to their expense report.

- Details, Allocate
- Check off expenses
- Select "Allocate Selected Expenses"
- Fill in:
  - Approver (type last name)
  - Funding Source (drop down)
  - Entity (drop down)
  - Account (drop down)
  - Funding Fiscal year

Non-Employees – Paper Vouchers for their reimbursement

- Non-employees (guests, candidates, "unpaid" students) do NOT need to complete a travel pre-approval form.

- The reimbursement funding source will determine what type of voucher to use for reimbursement: RF, State, UBF

Travel and Expense System Training

- Sign up for a Travel Training Session – UB Edge

    - Go to https://www.buffalo.edu/administrative-services/training/training-catalog/procurement/travel-expense-system.html

- Review Tip Sheets and Videos

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

Travel and Expense System Support

- Review Tip Sheets and Videos

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

- 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

Questions ?

How did I do?--Take the Session Survey on your smart device using the QR Code on your schedule.

Thank You!