

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: 123456NewYork120524
 - **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 *per diem* meals, do not use travel card for food purchases.
 - If opting for *actual* meals, collect receipts en route for subsequent uploading.
 - **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” charges (use expenses list).
 - Do not use “Paid by UHCL”
 - **Receipts?**
 - Upload an itemized receipt for every charge except per diem meal.
 - **Mileage?**
 - Insert start and end addresses so mileage calculates automatically.
 - **Itemized Receipts?**
 - Obtain and upload receipts for all travel card purchases.
 - Do NOT purchase meals with Travel cards if selecting per diem option.
 - **Third Party Bookings**
 - Obtain itemized receipt, not mere total amount.

Please join our next Quarterly Training on Travel to receive in-depth information on creating Request and Expense Reports in Concur!