OVERVIEW

Every faculty member should have a travel profile. If you don’t have one, or are unsure, please contact your Department Support Staff. Your Support Staff will need to fill out the AXO Profile form and send it to castravel@slu.edu. Once your travel profile has been created, you will be given access to enter the Concur / Cliqbook site. You will also need to go into your profile and select your Support Staff as both TRAVEL ARRANGER and EXPENSE DELEGATE.

Pre-paid expenses such as conference registration, abstracts, or hotel should be submitted for reimbursement as they are incurred (before travel commences). Expenses incurred during the travel period must be submitted and approved with 60 days of the last day of travel. Failure to do so will require a written exception from your Department Chair/Program Director and Dean LaVoie for both domestic trips and international trips.

TRAVEL APPROVAL

For domestic travel, obtain approval from your Department Chair/Program Director no less than three weeks prior to travel, and document said approval by submitting the SLU Arts & Sciences Travel Form.

For foreign travel, obtain your Department Chair/Program Director no less than eight weeks prior to travel, and submit it as an attachment to the SLU Arts & Sciences Travel Form to obtain Dean’s approval.

It is acceptable to estimate conference and travel costs, as all costs may not be available. Travel approval is required for all University-funded travel, including grants and sponsored awards.

Information needed to complete SLU Arts & Sciences Travel Form includes:

1. Travel Destination:
2. Departure and Return Dates:
   - Departure Date:
   - Return Date:
3. Estimated Budget: (include all costs for the trip including registration fees, transportation costs, meals, lodging, etc)
4. Funding Source: (an actual fund number is required)

- Note: PRINT OR SAVE published conference hotel rates. They are required for reimbursement and are often removed from conference websites soon after conferences conclude.
- Your Chair’s/Director’s approval must be uploaded as an attachment in order to document travel approval.
TRAVEL ARRANGEMENTS

After you receive approval from your Department Chair/Program Director for domestic travel, or from your Chair/Director and the Dean for foreign travel, you may begin making your travel arrangements. Obtain a trip number in Self-Service Banner (Employee > Trip Menu); your Department Support Staff can assist you.

Once the trip number is obtained, you can begin booking flights and hotels through the booking tool CLIQBOOK, available through MySLU Tools. The University has a contract with TravelPlex to provide all travel arrangements. Therefore, all arrangements must be made through TravelPlex in Cliqbook. The link for manuals and training tutorials can be found at: http://www.slu.edu/x27620.xml

• Note: You must use CLIQBOOK for all air, hotel, and car rental reservations. The ONLY exception to this is the conference hotel. If you stay at a conference hotel, you may make your reservations directly through the conference. You may book lodging outside CLIQBOOK at a non-conference hotel at a rate lower than the lowest published conference hotel rate.

• If you find a lower cost flight on another website (Orbitz, CheapTickets, etc.) you must give TravelPlex the opportunity to meet or beat the lower fare. You may do so by calling our TravelPlex Service Agents at 1.314.569.1900. If TravelPlex is able to meet or beat the fare you MUST use them. If TravelPlex is unable to meet or beat the fare, you must get an email from them stating that fact. Then, and only then, are you free to book through another site. The email from TravelPlex must be uploaded into your expense report at the conclusion of your trip. You will not be reimbursed without the email from TravelPlex stating they could not meet or beat the lower cost fare.

• For international travel, please contact Joan Tarrant (joan@travelplex.com) to make arrangements.

POST-TRAVEL

What you should gather, if applicable:

• A copy of your award letter
• Published conference hotel room rates
• Detailed hotel bill or folio (Many international hotels do not provide the detailed receipts which are common to US hotels. Please provide as much documentation as possible.)
• MyTravelPlans Flight Invoice (not Itinerary)
• Cover page from conference program showing location and conference dates
• Documentation of related events or activities you attend outside the conference dates
• Parking receipts over $50
• Ground transportation receipts over $50
• Registration receipt (You must provide proof of payment. If the receipt shows the last four digits of a credit card, this is sufficient. Otherwise, you will need to provide your credit card statement, bank statement or both sides of the canceled check.)
Please note that memberships purchased to obtain lower conference registration rates must be submitted for reimbursement on a separate non-travel Concur report.

- Meal receipts over $50, in order to be reimbursed the full government per diem rate. You may also choose to be reimbursed at 75% of the per diem rate without submitting any meal receipts.

**How you should compile your documents:**

- Please photocopy and scan all receipts. You should retain the originals with your records. Your receipts best serve all parties along the data entry and approval chain if they are in chronological order and oriented in the same direction.
- ALL of your receipts and paperwork should be copied into a portrait orientation.

**Completing the actual expense report:**

- Log into CONCUR through MySLU Tools
- Create a new expense report: in the report header be sure to enter ONLY your trip number as the trip name (AXXXXXX). If you enter it incorrectly, your report will be returned to you for correction.
- Import all charges (if using AMEX T&E card)
- Import flight
- Create itinerary: (If you are choosing the 75% meal per diem with no receipts you must select NO meal receipts. Otherwise the system automatically defaults to “meal receipts.” If the selection is not made at the beginning of the report you CANNOT CORRECT your selection and will have to delete the report and start over.
- If claiming 75% per diem with no receipts, click on “Expense Adjustments”. The system automatically calculates when you click “Update Expenses”. Enter 75% in the vendor name.
- If you choose the meal receipt option, you must enter each meal expense individually.
- Enter the remaining expenses, hotel, transportation, etc.
- Click on options and attach all of your receipt images. If you need to attach additional receipts at a later point, attach only the additional receipts. Do not re-attach all receipts.
- Upon completion, email your Department Support Staff to complete any necessary fund re-allocations, make sure comments are in place, and fully review the report for accuracy. Your Department Support Staff will submit the report on your behalf.
- **FOR A COMPLETE SET OF HOW TO INSTRUCTIONS PLEASE VISIT THE LINK FOR MANUALS AND TRAINING TUTORIALS:** [http://www.slu.edu/busfin/training/online-training-resources](http://www.slu.edu/busfin/training/online-training-resources) and [http://www.slu.edu/Documents/busfin/Travel_Expense_Manual_updt_w_import_itin_May10%5B1%5D_new.pdf](http://www.slu.edu/Documents/busfin/Travel_Expense_Manual_updt_w_import_itin_May10%5B1%5D_new.pdf)