TRAVEL GUIDELINES FOR DTS FACULTY:
Effective for Academic / Fiscal Year 2013

OVERVIEW:

SUMMER:
Travel Requests for the coming academic year are sent to the office for departmental approval by the chair.

NO LESS THAN 4 WEEKS PRIOR TO DOMESTIC TRAVEL AND NO LESS THAN 8 WEEKS PRIOR TO INTERNATIONAL TRAVEL:
Pre-approval is sought from upper administration.

POST-TRAVEL:
Receipts and other pertinent paperwork (listed below) are gathered and entered for reimbursement following travel.

CAS PRE-TRAVEL APPROVAL:

After you receive your approved travel award from Jay, you MUST fill out the CAS pre approval form. We realize that not all details may be available at the time, but as you are all experienced with conferences, it is acceptable to estimate conference costs based on previous years. The information to be included in your request(s) should be emailed to castravel@slu.edu CCing elliottb@slu.edu The form can be found at: http://www.slu.edu/Documents/arts_sciences/CAS_Travel_Approval_Request_Form_FACULTY_GUESTS.pdf. Some MAC users may have troubles, therefore you can (Copy and paste the 7-points into the body of an email. If you are requesting multiple trips, send multiple emails and put your name and destination in the subject line

1. Reason(s) you will be traveling (conference, presentation, research etc.)

2. Name of Conference or Meeting: For international conferences, please provide a copy of the conference program or conference URL, when available.

3. Travel Destination:

4. Departure and Return Dates:

   Departure date:
   Return date:

5. Estimated Budget Note all costs for the trip including registration fees, transportation costs, meals, and lodging, etc.

   Total from below: $ ________________
   Registration Fees:
   Transportation Costs:
   Meals:
   Lodging:

6. Funding Source:

   Use 202480 for department-funded travel, Mellon Award if you received one

7. Trip Justification as Appropriate:
Notes: If you plan to drive, you must also submit a Transportation Calculator with your travel request. The document can be found here: http://www.slu.edu/Documents/busfin/Transportation-Calculator.pdf

REMEMBER: Print or save maps, car rental rates, and flight pricing. This must all be submitted with the Transportation Calculator, which is a required component for driving your own or renting a car.

PRINT or SAVE published conference hotel rates. They are required for reimbursement and are often taken down from the conference website very soon following the conference.

NOTE: Separate trip requests should be sent in separate emails with unique subject lines—do not reply to prior messages. This prevents them getting missed in an email chain. I suggest: “Travel Request, Jane Doe, Timbuktu, Nov 2011”

TRAVEL:

After you receive your approval from CAS (Domestic) and CAS and VP Patankar (International), you may begin making your arrangements through the booking tool AMEX CONCUR. Please obtain a trip number in self service banner. You will need this when booking. There are no exceptions to this rule. The link for manuals and training tutorials can be found at: http://www.slu.edu/x27620.xml

Notes: You must use AMEX CONCUR for all 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 outside of AMEX CONCUR

POST-TRAVEL:

WHAT YOU SHOULD KNOW:

- You enter your own expenses into reports. The link to training tutorials and manuals can be found at: http://www.slu.edu/x32563.xml
- After looking at the tutorials and manuals, if you still have problems, please schedule an appointment with Becky to go over your report.
- After you enter all your expenses, email Becky letting her know the report is ready. DO NOT SUBMIT YOUR REPORT

WHAT you should gather:

- If applicable, a copy of your award letter.
- Published hotel conference rates
- Detailed hotel bill
- MyTravelPlans Flight Invoice (not Itinerary)
- Cover page and pages from conference program detailing your activity(ies)
- Parking receipts
- Ground transportation receipts
- 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 or a copy of the cancelled check.
- Regarding meal receipts: You may decide to hold on to them and opt for claiming 60% per diem. It often works out that travelers go over on some days and under on other days, averaging the 60% per diem. You may always elect to claim your meal receipts. I strongly encourage you to claim the 60%, as it expedites the report tremendously.
- Regarding international accommodations: Many international hotels do not provide the detailed receipts common to hotels in the US. Please provide as much documentation as possible.
HOW you should compile it:

- Please **photocopy or scan all receipts** and retain your originals. Your receipts best serve all parties along the data entry and approval chain if they are in chronological order.
- ALL of your receipts and paperwork should be copied to a **portrait orientation**.

**STEPS:** *(THESE ARE THE WHAT TO DO, FOR A COMPLETE SET OF HOW TO INSTRUCTIONS PLEASE VISIT THE LINK FOR MANUALS AND TRAINING TUTORIALS:)*

- [http://www.slu.edu/x32563.xml](http://www.slu.edu/x32563.xml)

  - Log into AMEX CONCUR
  - Create new expense report: in the report header, **make sure the trip name is your trip number AXXXXX**. If you have received a Mellon grant, please list Mellon in the comments on the report header.
  - Import all charges (if using AMEX travel Card)
  - Import flight
  - Create itinerary: Note: please make sure you choose NO meal receipt if you are claiming the per diem. The system defaults to “meal receipt” and if you do not change it, you will have to start over.
  - If claiming 60%, click on expenses and adjustments. The system automatically calculates the per day 60% per diem expenses, just click on update expenses. You will have to enter 60% in the vendor name.
  - If you choose the meal receipt option, you must enter all receipts individually and attach all receipt images
  - Enter the remaining expenses, hotel, transportation, etc.
  - Click on options and attach all your receipt images
  - Upon completion email Becky, as she will do the re-allocations, make sure the comments are in place, and fully review the report for accuracy. She will then submit the report on your behalf.

**POINTS TO REMEMBER:**

- You MUST enter your expense report within 60 days of the date of trip. There are NO exceptions to this rule.
- 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 or a copy of the cancelled check.
- Always use 202480 as the funding source, unless you have a Mellon award or grant that will fund your trip.
- For a complete list of Q&A’s, visit: [http://www.slu.edu/busfin/departments/card-programs/travel/travel-faq](http://www.slu.edu/busfin/departments/card-programs/travel/travel-faq)