

TRAVEL GUIDELINES FOR ARTS & SCIENCES FACULTY AND STAFF

Effective for Academic/Fiscal year 2016

OVERVIEW

❖ *College policy may be more restrictive than the University policy.*

Everyone 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 site. You will also need to go into your profile and select your Support Staff as both a **Travel Arranger** and an **Expense Delegate**.

Travel requests MUST have your Department Chair's or Program Director's approval, a copy of which must be attached to your travel pre-approval request.

NO LESS THAN THREE WEEKS PRIOR TO DOMESTIC TRAVEL AND EIGHT WEEKS PRIOR TO FOREIGN TRAVEL:

Seek pre-approval from your Department Chair/Program Director for domestic travel, and from your Department Chair/Program Director and the College for foreign travel. The required forms for submission can be found on the [CAS website](#).

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 travel status must be submitted and approved within 60 days of your last day of travel. Failure to do so will require a written exception from your Department Chair/Program Director and Dean LaVoie.

PLEASE NOTE THAT EXCEPTIONS ARE GRANTED ONLY IN UNUSUAL CIRCUMSTANCES. REIMBURSEMENT IS NOT GUARANTEED IF YOUR REPORT IS SUBMITTED AFTER 60 DAYS.

CAS PRE-TRAVEL APPROVAL NOTIFICATION:

After you receive your approved travel award from your Department Chair, you **MUST** fill out the [SLU Arts & Sciences Travel Form](#). You may estimate conference and travel costs, as not all costs may be available at the time of pre-approval. Travel pre-approval is required for all University-funded travel, including grants and sponsored awards.

- Note: 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.
- If you choose to drive your own car on trips that are greater than 200 miles round trip, you must also submit a Transportation Calculator with your travel request. Please print and save maps, rental rates from TravelPlex and airfare quotes from TravelPlex as these must be submitted with the Transportation Calculator, which is a required component for driving your own car or renting a car. You can find the Transportation Calculator here: <http://www.slu.edu/Documents/busfin/documents-and-forms> (Note: you must be logged into your SLU Google account in the same browser in order to access this form.)
- Your Chair's/Director's approval must be uploaded as an attachment to your travel form.

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After you receive approval from your Department Chair/Program Director (and Dean LaVoie for foreign travel), you may begin making your travel arrangements. You will need to obtain a trip number in Self-Service Banner; your Department Support Staff can assist you. Once the trip number is obtained, you can begin booking flights and hotels through the booking tool available in MySLU Tools. The University has a contract with TravelPlex to provide all travel arrangements. Therefore, all arrangements must be made through Travelplex. The link for manuals and training tutorials can be found at: <http://www.slu.edu/x27620.xml>

- Note: You must use TravelPlex 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.*
- If you find a flight that is lower cost on some other website (Orbitz, CheapTickets, etc.) you must give TravelPlex the opportunity to meet or beat the lower cost fare. You may do so by calling our TravelPlex Service Agents at 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 cheaper fare.
- **FAILURE TO BOOK YOUR TRIP THROUGH THE BOOKING TOOL MAY RESULT IN NO REIMBURSEMENT. DEAN LAVOIE MAY GRANT A POLICY EXCEPTION IN UNUSUAL CIRCUMSTANCES. HOWEVER, POST-TRAVEL "FORGIVENESS" WILL BE MORE DIFFICULT TO OBTAIN.**

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 foreign 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 showing dates and location of conference
- 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, bank statement or **both sides** of the canceled check.)
- Meal receipts (You may choose either to submit itemized receipts and be reimbursed for the actual amount up to the per diem rate, or to be reimbursed at 60% of the per diem rate without submitting any food receipts.)

How you should compile your documents:

- 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, preferably portrait.

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 60% 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 MODIFY your selection later, and will have to delete the report and start over.
- If claiming 60% per diem, click on “Expense Adjustments” and the system will automatically calculate the reimbursable amount. You must then enter 60% as the vendor name for each day.
- If you choose the meal receipt option, you must enter all receipts individually and attach all receipt images.
- Enter the remaining expenses, such as hotel and transportation.
- Click on “Options” to 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 expense delegate (usually your departmental administrative staff) to make necessary reallocations, make sure the comments are in place, and fully review the report for accuracy. They will submit the report on your behalf. The College requires department-level review (by administrative staff or chair) of all Concur expense reports.
- 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> and http://www.slu.edu/Documents/busfin/Travel_Expense_Manual_updt_w_import_itin_May10%5B1%5D_new.pdf