Important Notification:
If you have not yet read my Intro Guide on how to set up your profile in Concur, add your admin assistant so that they can see and help with you with your trip requests and expenses, and apply for an ASU Travel Card, start there.

Background / Overview:

Trips in Concur Travel have 2 parts:

1. **Trip Request:** This must be **fully approved** before you purchase registration or flight or make your hotel reservation. In the request section, you list estimates of all the expenses for the trip you want to take. Common ones include conference/training registration, flight, hotel, meal per diem. These are *estimates*, but they should be as accurate as possible.

2. **Expense Report:** This is where you list actual costs of everything post trip.

Paying For Your Trip
If you are a frequent traveler (multiple times a year) you can request an ASU Travel Card. If you are an infrequent traveler (less than once per year) it is recommended that you pay for your trip out of pocket and be reimbursed after the Expense Report. If this is not possible, you can request a travel card, but it must be turned in and kept by the admin team when you are not in travel status. **All Travel Cards must be approved via email by Lev prior to requesting one in the system.**

TRAVEL REQUEST

1 – You are given *emailed approval* from Lev to attend a conference or some other travel (this requirement as of July 2021). This email must include justification for your trip and state what safety precautions you will be taking. This email must be attached to your Trip Request in Concur (see #2).

2 –You must put in a **Trip Request in the My ASU Trip system, and this must be fully approved before you can make any purchases related to the trip** (purchase registration or flights or reserve hotel). Making any travel related purchase (flight, registration, hotel reservation) in any way or with any method of payment without a fully approved request in the My ASU Trip system is a violation of procedure and will cause a red flag and audit. Do not cause a red flag and audit. *It can also mean you do not get reimbursed for your travel expenses*, so take this seriously.

3 – Once the trip request is entered and fully approved in the My ASU Trip system, then you can go ahead and pay for registration/flight/hotel. **Flights** can be purchased directly
through Concur when you put in the 4 digit ID of your approved travel request. It is just as easy as purchasing flights via any other website with the priceless bonus of it being available in your post trip expense report without you having to do anything extra. **Your hotel** must be reserved through Concur. This is the case even if you pay with a personal credit card. The only exception to the rule of booking via Concur is if you have to book a conference hotel via the conference website to get the conference rate. If you do that, you must immediately email a copy of your hotel reservation to My ASU TRIP MyASUTRIP@exchange.asu.edu along with the justification of why you did not purchase via Concur.

**Note:** For Travel Requests you need the approval email from Lev and estimated costs for four things:

1. Conference/Event Registration
2. Airfare
3. Hotel
4. Meal per diem, which Concur calls Daily Allowances (you don’t need to know the $ amount for this, the system figures automatically, just don’t forget to put it in the request)

Those are the main ones to worry about beforehand. If you want to be exhaustive about taxi or airport parking (RE: Airport parking - see Note immediately below!) or other expenses you can, but the four above are sufficient for a Travel Request.

**Note about Airport Parking:** ASU requires receipts for any parking cost over $25. The absolute most ASU will reimburse for airport parking is $50. If your parking will be higher than that, ASU Travel suggests taking the shuttle. If your shuttle costs would be higher than $50, we need to document that in the trip. Above $50, you are required to document that you have chosen the least expensive option (parking vs shuttle).

**FILL OUT YOUR TRAVEL REQUEST**
Fill all these boxes out (Project/Gift/Grant Program and Cost Center are our account numbers. If you don’t know what yours is, just ask your admin):

**Expenses**
The most common expenses are highlighted below. Daily Allowances is the meal per diem expense. It will auto populate the $ amount based on the dates and location you put in the first page of the request.
**Can I drive my car instead of fly?**
I get this question a lot, especially for conferences in Vegas. Yes, you can, but ASU is not going to pay you more for mileage than they would for the flight. Go look up the flight you would have taken if you were flying, and screen shot the cost and save it. Then you will request that $ amount on the expense report (in the Mileage category). Also, on some occasions, multiple staff will carpool. In this case, you can make the argument that it is cheaper to pay the full mileage reimbursement than to pay flights for X number of staff members.

**Car Rental**
On those very rare occasions when a meeting or conference occurs somewhere far from an airport, it is occasionally necessary to rent a car (ASU will only cover this if car rental is *cheaper* than the alternative transportation, such as Super Shuttle).

NOTE: ASU has an Authorized Driver Program. YOU are responsible for making sure you have taken the training and your authorization in this program is current at the time period of your car rental. Travel will check. If it’s not current, you will be covering your car rental out of pocket. [https://cfo.asu.edu/authorized-drivers-program-faqs](https://cfo.asu.edu/authorized-drivers-program-faqs)

**Approval Flow**
Your admin’s name goes in the Cost Center Manager unless your travel is being paid by another account or department, in which case you need to ask the people funding the travel what their account # is and who their Cost Center Manager is (the system does require you to put in a name that matches an approver for that account).
ATO – Your cost center manager puts that in, don’t worry about it.

Note the request ID number! It’s important. (For the above example the request # is FVE6. Learn to note it and write it down somewhere you can find it when you go to purchase your flight.)

Submit request
Once your request is fully approved you can make your flight and registration purchases and hotel registration. Purchase your flight via Concur. This makes everyone’s life easier and auto loads the flight times and costs to the Expense Report.

NEXT STEP – PURCHASING YOUR FLIGHT AND HOTEL IN CONCUR

Flight
***NOTE: You do not use your Travel Card for this. You input your approved request ID (see above) and the flight is charged to ASU automatically.

Go here: Purchase the flight just like you would in any other website, except that where it asks for the 4 digit approved request code (or a phrase to that effect), put in the 4 digit number that you were supposed to write down when you did the request (our example was FVE6, remember?). If you neglected to follow my advice above, or if you can no longer find the sticky note, then just click on the Requests header and look. It’s on that screen under Request ID.
Note: You have to click through an inordinate amount of screens to complete the purchase. Several times you will probably think, “Surely this is the last one and I will be done.” Eventually that will be true.

After you submit this flight purchase in the system, it will be sent to Anthony Travel. An agent there will purchase the flights and send you the purchased tickets via email. Save a pdf of that email. You will need it as a receipt when you do your Expense Report.

**Hotel**

*Your hotel* must be reserved through Concur. This is the case even if you pay with a personal credit card. The only exception to the rule of booking via Concur is if you have to book a conference hotel via the conference website to get the conference rate. If you do that, you must immediately email a copy of your hotel reservation to My ASU TRIP MyASUTRIP@exchange.asu.edu along with the justification of why you did not purchase via Concur.

**WHILE YOU ARE TRAVELING**

Several staff members have reported that they like the **Concur app**. This way they do not have to save receipts, and can just snap pics of most receipts with their smartphone (but not hotel. Save the hotel receipt so you can scan it and read it clearly)
Access Mobile Registration in your Profile in Concur. See screen shot:

If you do not like using the mobile app, you will need to save your receipts and manually scan them and add them to the system when you return.

**Conference & Hotel Documentation**
You will need to attach a conference 'brochure' (generally a pdf from the conference website showing the dates and location of the conference as well as suggested hotels) to the expense claim.

**Taxis, Uber, Lyft, Etc (tipping)**
Be aware that ASU will not allow any tip over 20%, so please do the math, and if you want to be generous, remember that extra will be coming out of your pocket.

**Meals**
You do not need to keep or turn in receipts for meals. Travel doesn't want them. ASU pays a standard per diem $ amount for all covered meals, based on the location and travel times noted in your other documentation. You can have caviar and prime rib, or you can eat ramen and peanut butter sandwiches, ASU doesn't care.
**However**, if your hotel or the conference provides any meals (like complimentary breakfast) and this is noted on your documentation, we need to exclude those particular meal(s) from the per diem section of your expense report. Travel does check the hotel and conference documentation for this, and ASU will not pay you meal per diem just because you didn't want to get up early enough for the continental breakfast and bought breakfast somewhere else.

**Meals and the Travel Card:**
You *can* use your travel card, if you have one, to purchase all your meals while in travel status. *However*, if you do this, ASU meal per diem may be insufficient to cover the actual cost of eating in your travel destination, resulting in you owing money back to ASU Travel for the overage. My suggestion would be to check the daily per diem amount (just ask me if you don’t know how to look up location per diem) for that zip code, and make sure the amount you spend on the Travel card each day remains under that amount by paying for one or more meals out of pocket. You will not ‘lose’ anything by doing this as you will be reimbursed for the difference between what you spent and the per diem amount when the expense report is finalized.

**Please Do Not purchase alcohol with your Travel Card. No beer or wine with dinner unless you put it on your own personal card.**

**Hotel**

As long as a hotel is a listed conference hotel (the conference website includes it on a list that can be printed to pdf and uploaded to your expense report as documentation), ASU will reimburse the cost of a basic room, regardless of hotel per diem for that zip code. **This does not mean you can get the penthouse suite in a conference hotel and expect ASU to pay for it.**

A special note about the hotel: It is *best* to have only room charges (taxes, fees, etc) on the hotel receipt. Neither I nor Travel care if you decimate the mini bar and order questionable stuff on pay-per-view (I might be amused, but I won't *care*), but since none of that is a reimbursable expense, it's just much easier if it doesn't show up on the hotel receipt at all. That being said, don't suffer needlessly. It just takes longer to untangle reimbursable from un-reimbursable expenses if they are on the receipt.

**If the hotel charges extra for wifi** (which *is* a reimbursable expense if used for ASU business - checking email, etc), and that is on the hotel receipt, ASU will reimburse it, but it's reimbursed as "Misc", not as "Lodging," so it has to be put in that section of the Expense Report.

**Hotel receipts** are the exception to the 'do not bother to keep paper receipts if you take pictures of them with your phone and upload them to the app' rule. Hotel receipts tend to be complicated and have multiple charges. The system requires us to input all nightly charges and the various taxes individually, so you need to be able to read them
clearly. In order to make sure you can do that, please either save the paper receipt or get a very good scan of it.

**WHEN YOU GET BACK**

Now it’s time to do your expense report. Don’t worry, if you’re nervous you and your admin can look it over before you submit it.

**Step 1: Create your expense report**

Go into the requests field. Assuming your initial request was fully approved there will be an “Expense” link in blue. Click that to create a linked Expense Report with the fields auto populated.

The report header should pop up, autofilled with the information from the request.
Step 2: Create Itinerary
You need an itinerary to generate per diem (daily allowances) and to enter the hotel expenses. Click the Details drop-down menu, then select New Itinerary under Travel Allowances. The itinerary is needed to generate per diem expenses, also known as daily allowances, and to enter hotel expenses.

If you purchased your flight through the Concur system, you should be able to just import the itinerary (which is an excellent argument for purchasing via Concur). Just choose the appropriate itinerary of those available.

If you did not purchase your flight through Concur, or you did not fly at all (if you drove), or if, for some reason, Concur did not create an itinerary like it was supposed to, you need to manually create an itinerary. Just fill in the cities (note, the Arrival City is the city...
where you lodged, not where the airport is, if they’re different) and correct departure and arrival times.

Click Next. This should pop up a screen with all available meals. Look at your flight times. The system does not automatically disallow the meals that you cannot claim due to flight times (if you flew at 11:00 a.m., you must manually check the Breakfast Provided box, as you’re not entitled to breakfast per diem), or that your hotel, conference, or meeting host fed you.

**Step 3: Import and Create Expenses**

Note that it can take up to a couple of weeks for all Travel Card expenses to hit Concur. Those need to be in the system before you can import them to your expense report. Do not manually add any Travel Card expenses to your Expense Report, wait for them to load to the system.

Click the Import Expenses box and choose all expenses that go with the trip you’re working on:

For expenses that were not on travel card (paid out of pocket, or paid via Pcard ...don’t forget those if your registration or other expense was on the Pcard), you need to create the expense:

Make sure all expenses are correct amounts and showing as correct type (if you purchase a meal from a hotel restaurant, or a coffee from a Starbucks in the hotel with your Travel Card, very often the expense will come in mislabeled as a hotel expense. Just change it to Meals On Travel Card). Speaking of which: Meals On Travel Card is the designation for any food item that ends up in Expenses because you used your Travel Card to pay for it (even a bottle of water at the airport).
If you didn’t use the Travel Card app, scan your receipts, upload them, and attach them to the relevant expense.

**Hotel Expenses:**
In addition to the ‘main’ expense tab and the receipt tab, Hotel Expenses have a third ‘itemization’ tab. Fill out all these fields. The amount has to add up to the total expense.

Don’t forget to include the documentation that you stayed at a conference/meeting hotel (such as a printout from the website, or your registration if the conference is one where you book the hotel along with conference registration). If your hotel receipt has your conference listed (sometimes they have a heading under event rate for that) then that will cover your hotel documentation.

![Hotel Expenses screenshot]

**Conference Brochure:**
If your travel didn’t include conference registration fees (if the registration was free or comp’ed, or if you were attending a meeting rather than a conference) make sure you upload a ‘conference brochure’ (you can print to pdf from the conference website or save the email invite to the meeting or whatever passes for documentation that you are traveling to attend something).

**Step 4: Approval Flow**
When you’re all done, click Details and choose Approval Flow.
Cost Center Manager is your longsuffering admin (last name first).

You’re done! Probably. Go have a cup of coffee or other celebratory beverage.

**OTHER TRAVEL RELATED SITUATIONS**

I will add to this as things come up, I get questions, etc.

**Personal travel**

Occasionally a traveler extends his or her stay beyond the actual conference or meeting dates (sightseeing, beginning/ending a vacation, visiting family or friends in the area). Assuming your days off are approved by your supervisor this is not a problem. However, you cannot receive per diem or lodging for the extra days. Per diem can extend to dinner the day before the conference starts as well as breakfast the day after the conference ends. The same goes for lodging – it is allowable to claim the lodging fee for the day before the conference and on the night the conference ends.

**Non-Travel Expenses / Use of Travel Card in Error**

DO NOT use your travel card for *any* expenses that are *not* part of you your approved ASU business travel (if you have any questions about what is or is not an ‘approved’ expense, ask your admin). It is **not an ASU purchasing card**. Using your ASU Travel Card for purchases unrelated to travel will result in ASU taking the money back out of your next paycheck. Refusing to learn your lesson will result in ASU cancelling your Travel Card altogether. It is heavily recommended that, assuming you keep your Travel Card in your wallet, you do not put it right next to your personal cards, to reduce the chance of error.
**Uber & Lyft**

The most common use of a Travel Card in error is when using Uber, Uber Eats or Lyft for a personal expense. Because Uber saves your credit card info, it is a known issue that their system may automatically charge your Travel Card rather than your personal card, as you intended. If that happens, let me know and we will submit a Non-Travel Expenses expense report. This is the only time you can submit an expense report that is not tied to an approved request. It is necessary to name the expense report Non-Travel Expenses (that exact phrase).