

Travel Card

Frequently Asked Questions

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Top 10 Questions

I don't have a travel card. How can I pay for my travel expenses?

There are 2 payments options for travel expenses: your travel card or your personal credit card. If you don't have a travel card, you will pay for your travel expenses out-of-pocket and be reimbursed after travel.

Are Travel Cards tied to a department index?

No. Travel Cards are not tied to a specific index. Travel card charges are allocated to index/s on an expense report after travel.

What purchases are allowed on my Travel Card?

Airfare, baggage fees, hotel (including Airbnb), rental car and rental car fuel, transportation, parking, and conference registration fees associated with in-state overnight, out-of-state, or international trips. Membership fees included in conference registration fees are allowed with prior executive approval.

Can I pay for conference registration fees on my Travel Card?

Yes, if the conference registration fees are associated with an in-state overnight, out-of-state, or international trips. A travel card can't be used for virtual conferences or day-trip conferences.

My travel card is declining for a conference registration fee. What should I do?

Contact the Travel Office at extension 8965.

Do I need to pay tax for in-state hotels even though we are sales tax exempt?

Yes. We are required to pay tax for in-state hotels.

Do I need receipts for travel card purchases?

Yes. Receipts are required for all travel card purchases.

What the limits on a Travel Card?

All Travel Cards come with standard monetary limits.

- \$10,000 per transaction
- \$10,000 per billing cycle

Any charge in excess of either limit will automatically decline. It is the traveler's responsibility to contact the Travel Office to request a limit increase.

What if I need my Travel Card limits increased?

To receive a temporary increase on a Travel Card limit, you must email the Travel Office (travel@uvu.edu) the following information: your destination and dates of travel, what your limits need to be increased to (specific dollar amount), what you are purchasing that requires an increase, when you will be making the purchase. CC the responsible party on the index on the email. Limit increases are made at the discretion of the Travel Office. You must have an approved Concur Request before requesting a travel card limit increase.

What if my travel card is declined?

If your card is declined you may call US Bank Customer Service at 800.344.5696 or contact the Travel Office at travel@uvu.edu or 801.863.8965.

Please note that Customer Service cannot increase your card limits or open your card for charges that are excluded from the parameters of the card.

General

What is a Travel Card?

A Travel Card is a university-owned, university-paid credit card available to full-time employees for travel related purchases for approved in-state, out-of-state, and international trips.

Am I required to obtain a Travel Card?

No. Travel Cards are not mandatory. If you do not have a travel card, personal funds must be used to pay for your travel expenses.

Why should I obtain a Travel Card?

A Travel Card eliminates the need to use personal funds to travel on University business. All basic travel expenses, except for food, can be paid for using the travel card.

Who should obtain a Travel Card?

Every full-time employee who plans on traveling for university business or booking travel for university guests needs to have their own travel card.

I don't have a travel card. How can I pay for my travel expenses?

There are 2 payments options for travel expenses: your travel card or your personal credit card. If you don't have a travel card, you will pay for your travel expenses out-of-pocket and be reimbursed after travel.

Are Travel Cards tied to a department index?

No. Travel Cards are not tied to a department index. Travel card charges are allocated to index/s on an expense report after travel.

What is the billing cycle for the Travel Card?

The billing cycle on the 6th of each month. If the 6th falls on a weekend or holiday, the cycle will begin the following business day.

Can a part-time employee obtain a Travel Card?

No. Travel cards are only available to full-time employees.

Do I need receipts for travel card purchases?

Yes. Receipts are required for all travel card purchases.

Do I need to pay tax for in-state hotels even though we are sales tax exempt?

Yes. We are required to pay tax for in-state hotels.

Do I need to have my travel card when traveling?

Yes, take your travel card with you when traveling. Even if you have pre-paid for expenses, businesses may need to see the physical card to verify your identity or payment information.

How do I change my name on my Travel Card?

If your first or last name have changed, contact the Travel Office (travel@uvu.edu) to request an updated travel card. Make sure your name has been changed in Banner before you request the update to your travel card.

How do I keep my Travel Card safe?

Here are some best practices to keep in mind:

1. Sign the back of your card as soon as you pick it up.
2. Never write account numbers or personal information on unsecured documents. If you need to communicate about a card, include the last 4 digits of the card account number only.
3. Do not provide information over the phone unless you initiated the call and the company is reputable.
4. Do not lend the card or PIN to anyone.
5. Make sure your card is always in your possession. Do not leave it in a drawer or out in the open.
6. Report any questionable charges promptly to US Bank Customer Service.
7. Regularly review your travel card charges in Concur.
8. Reconcile your travel cards within 30 days of your trip return date.
9. Report lost or stolen cards immediately to US Bank.
10. Keep an eye on your card during the transaction and ensure it is returned as quickly as possible.
11. Protect the account number at all times. If you receive an email, telephone call, text, or other form of communication asking to confirm an account number, do not provide any information.

How to get a travel card

How do I obtain a Travel Card?

You must fill out a Travel Card Application and complete the Travel Card Training Course. Links to the application and training course can be found in the Travel Card section on myUVU>Employees>Purchasing and Travel.

How long does it take to obtain a travel card?

Cards usually take 5-7 business days to arrive once your travel card application is complete. Training must be complete before taking possession of a travel card.

How am I notified when my card arrives?

You are notified via email when your card is ready for pickup.

Allowable and non-allowable Purchases

What purchases are allowed on my Travel Card?

Airfare, baggage fees, hotel (including Airbnb), rental car and rental car fuel, transportation, parking, and conference registration fees associated with in-state overnight, out-of-state, or international trips. Membership fees included in conference registration fees are allowed with prior executive approval.

What purchases are not allowed on my Travel Card?

Non-allowable purchases include, but are not limited to individual meals, room service and other hotel incidentals, alcohol, fuel for personal vehicles, personal guest expenses, personal travel days, and other personal expenses.

Can I purchase food on my Travel Card?

No. Travel Cards are not available for food purchases. The traveler pays for their meals out-of-pocket and is reimbursed when they complete an expense report in Concur.

I am traveling with students and want to pay for their meals. What are my options?

Please contact the Travel Office at extension 8965 – option 3 to discuss options for student meals before submitting your Concur Request.

Can I pay for conference registration fees on my Travel Card?

Yes, if the conference registration fees are associated with an in-state overnight, out-of-state, or international trips. A travel card can't be used for virtual conferences or day-trip conferences.

Lost/stolen cards

My Travel Card has been lost or stolen. What do I do?

Immediately call US Bank Customer Service at 800-344-5696. Tell the representative you don't have the account number because the card is lost or stolen. They will request information from you to verify your identity, review any recent charges, and send a replacement card.

Card Limits

What the limits on a Travel Card?

All Travel Cards come with standard monetary limits.

- \$10,000 per transaction
- \$10,000 per billing cycle

Any charge in excess of either limit will automatically decline. It is the traveler's responsibility to contact the Travel Office to request a limit increase.

What if I need my Travel Card limits increased?

To receive a temporary increase on a Travel Card limit, you must email the Travel Office (travel@uvu.edu) the following information: your destination and dates of travel, what your limits need to be increased to (specific dollar amount), what you are purchasing that requires an increase, when you will be making the purchase. CC the responsible party on the index on the email. Limit increases are made at the discretion of the Travel Office. You must have an approved Concur Request before requesting a travel card limit increase.

Declined Transactions

What if my travel card is declined?

If your card is declined you may call US Bank Customer Service at 800.344.5696 or contact the Travel Office at travel@uvu.edu or 801.863.8965.

Please note that Customer Service cannot increase your card limits or open your card for charges that are excluded from the parameters of the card.

My travel card is declining for a conference registration fee. What should I do?

Contact the Travel Office at extension 8965.

Billing Address

What address should I use when making purchases with my Travel Card?

800 West University Parkway
Orem, UT 84058

Transactions may decline if you do not use this address when making purchases with the travel card.

Disputing a Transaction

How do I dispute a transaction on my Travel Card?

First, call the vendor to try to resolve the situation. If you are unable to resolve the dispute with the vendor, call US Bank Customer Service at 800-344-5696. You have 60 days from the date of the transaction to dispute it with US Bank. Be proactive and respond to all communication from US Bank promptly.

International Travel

What should I know before I use my Travel Card on my international trip?

Call US Bank Customer Service at 800-344-5696 and inform them of your international travel plans. This can prevent transactions from declining while abroad. If you do not call US Bank to obtain this override, transactions may decline while traveling.

It is becoming more common for international travelers to need a PIN when making purchases, even though the travel card is a credit card. Contact US Bank Customer Service or go online to reset the PIN.

How do I reset my PIN?

You can contact US Bank customer service and ask them to reset your PIN.

You can also go online to <http://access.usbank.com> to reset your PIN.

Click on Change Your PIN.

Enter the card information.

Check your email for a passcode.

A second email is sent to you. Follow the link in this email to the unique page where you enter the passcode. Once authenticated, you can reset your PIN.

Card Statements

Will I receive bank statements in the mail?

No. All travel card charges feed into Concur. You can view transactions in the Available Expenses section within your Concur profile. Bank statements are not needed to reconcile your travel card charges.

Can I access bank statements for my Travel Card?

Yes, if you register your card with US Bank. Go to <http://access.usbank.com>. Select Register Online.

Complete the Required Fields:

Organization Short Name: UVU

Account Number: your travel card number

Account Expiration Date: your travel card expiration date

Last four of SSN: 1234

Click Register Account and complete the account creation.

Moving Departments/Leaving the University

I have moved to another department on campus. What do I do with my Travel Card?

If you will remain a full-time employee, keep your card for future trips. Before you use your card, you will complete a Request in Concur. Your new department will approve the Request.

If you will be a part-time employee, make sure all your travel card charges are reconciled and contact the Travel Office at travel@uvu.edu.

I am leaving UVU. What should I do with my Travel Card?

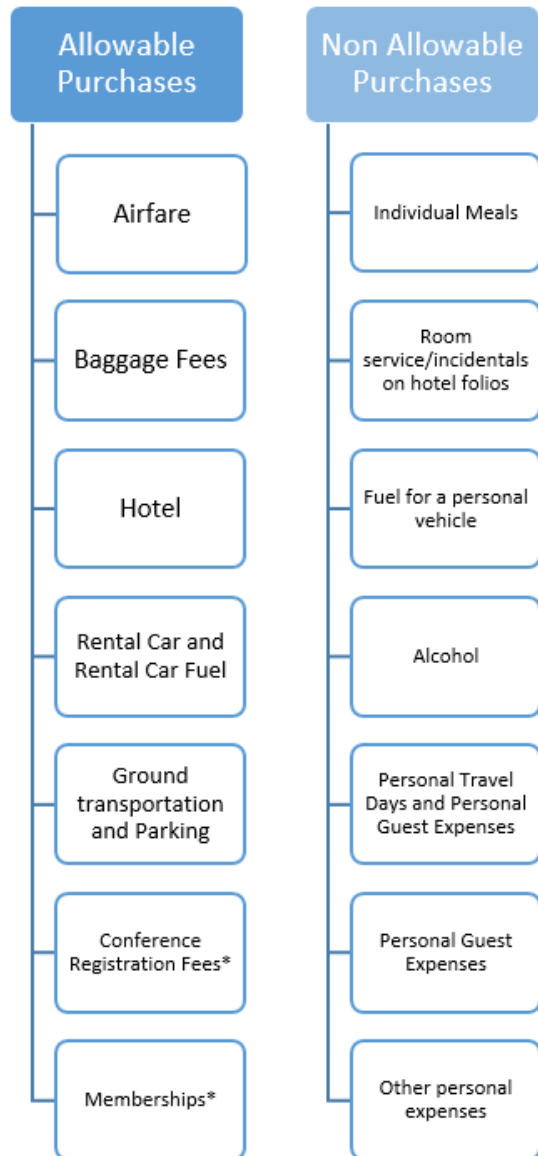
If you terminate your employment with UVU you should inform the Travel Office (travel@uvu.edu) prior to the change. You should also make sure that all travel card charges have been reconciled and all expense reports are submitted prior to leaving the University.

Travel Card Cheat Sheet

A travel card can only be used to purchase expenses associated with an approved in state overnight, out-of-state, or international trip. A travel card can't be used for day trips or online events.

Allowable vs Non-allowable Purchases

*Conference registration fees must correspond with an in-state overnight, out-of-state, or international trip. Memberships included in a conference registration fee require prior executive approval.



Card Limits

Single transaction limit - \$10,000

Monthly limit - \$10,000 (resets on the 6th of every month)

To request a temporary increase email the Travel Office (travel@uvu.edu) with the following information:

- Destination and dates of travel
- What is being purchased that requires an increase (be specific)
- What the limits need to be increased to (a specific dollar amount)
- When the purchase will be made
- CC the responsible party of the index that is funding the trip

Reconciliation of Travel Card Charges

All travel charges, including credits, must be reconciled on an expense report within 30 days of your return.

Registering your Card

1. Go to US Bank Access Online <http://access.usbank.com>
2. Select Register Online
3. Complete the required fields:
Organization Short Name: uvu
Last 4 of SSN: 1-2-3-4
4. Click Register Account and complete account creation

When to Contact US Bank Customer Service (1-800-344-5696)

- Traveling Internationally

Let US Bank know your travel plans before departure. You may be asked for a PIN while traveling abroad.

If you don't know your PIN contact US Bank to reset or reset [online](#).

- Lost/stolen Card

Immediately notify US Bank about a lost or stolen card. A replacement card will be issued to you through the Travel Office.

- Declined Transaction

If you are making an allowable purchase that is within the card limits, your card may be declining because the transaction is flagged as fraud.

For more information about travel cards, see the **Travel Card FAQs** on myUVU>Employees>Purchasing and Travel.

Updated August 26, 2021



Approver

Frequently Asked Questions

Where are my approvals?

All Concur approvals are in the Approvals tab on the top navigational ribbon. You will see the number of Requests and Expense Reports pending your approval. Click on the Request or Report Name to view the document.

What is a cost object approver?

A cost object approver is the responsible party on an index.

What happens when expenses are allocated to more than one index?

The Request or Expense Report will go to the responsible party on every index for approval. The approver will only see expenses allocated to the index they are responsible for.

How do I have someone approve on my behalf while I am out of the office?

Fill out the Wolverine Marketplace and Concur Proxy Approver form located on myUVU- Employees-Budgets and Financials-Finance Forms and Training. Contact Wendy Rosenlof at WendyR@uvu.edu with questions regarding this form.

How do I allow my administrative assistant to review Requests and Expense Reports before I approve them?

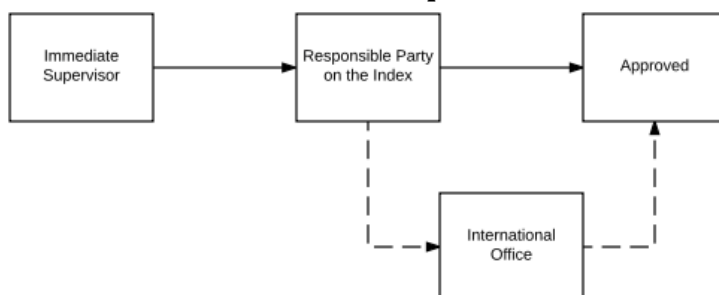
To add a previewer, click on Profile and then Profile Settings. Select Request Delegates under Request Settings (left hand side). Click Add. Enter the person's name and select it. Check the boxes under Can Preview for Approver and Receives Approval Emails. Click Save.

Both you and the previewer will receive emails about documents pending your approval. A previewer will review the document and click Notify Approver if it is ready for approval. You will receive an email from Concur letting you know your previewer has reviewed the document and it is ready for approval.

I am set up to approve on behalf of someone else. How do I access those approvals?

Click on Profile. You should see the option to "Act on behalf of another user." Type the person's name who you are acting on behalf of in the search box. Select it and click Start Session. Click on Approvals on the top navigational ribbon. To stop acting on behalf of someone, click on Acting as in the right hand corner and click End Session.

What is the workflow for Request?



What do I need to look for when approving a Request?

Header	Expense Summary
<ul style="list-style-type: none"> •Dates and Destination •Trip Purpose •Traveler Type - Is this guest or group travel? Has the appropriate selection been made? •Index •Attachments - Is a conference agenda attached? List of group travelers? 	<ul style="list-style-type: none"> •Are all anticipated travel costs included? •Are the travel costs within budget?

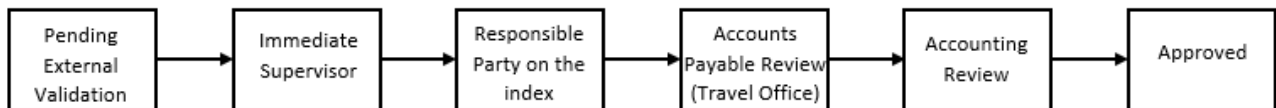
How can I view attachments to a Request?

Click on Attachments and View Attached Documents.

Does a Request encumber funds?

No, a Request does not encumber any funds in Banner.

What is the workflow for Expense Reports?




What do I need to look for when approving an Expense Report?

<p>Header</p> <ul style="list-style-type: none"> •Click on Details>Report Header. Is a Request attached? In-state overnight, out-of-state, and international travel are required to have a Request. •If no Request is attached, has the traveler explained why? 	<p>Index Allocations</p> <ul style="list-style-type: none"> •Click on Details>Report Header to view index. •If Expense Report has been allocated, click Details>Allocations. Click Summary to view all index allocations. 	<p>Standard Meal Per Diem</p> <ul style="list-style-type: none"> •Click on Details>Expenses and Adjustments to see meal per diem each day. •Are meals provided by the conference excluded? •Are personal days excluded?
<p>Personal/Non-reimbursable expenses on travel card</p> <ul style="list-style-type: none"> •Is there a receipt attached showing they paid the University back or a Reduction for Personal Expenses on the report? 	<p>Receipts</p> <ul style="list-style-type: none"> •Receipts need to be attached to every expense except Standard Meal Per Diem and Mileage. •Hotel receipts must be itemized show payment. 	<p>Report Totals</p> <ul style="list-style-type: none"> •Are the travel expenses within budget? •View a breakout between reimbursable expenses and travel card charges by clicking on Details>Totals.

How can I view receipts on an expense report?

There are three ways to view receipts.

- 1) Click on Receipts (on the top next to Details) and select View Receipts in new window. This will show you all the receipts for the report.
- 2) Click on an expense and click on the Receipt Image tab on the expense.
- 3) Hover over the receipt icon 

Are there ways to sort an expense report?

Yes. Click on any of the Column Headers (Expense Type, Transaction Date, Amount, etc.) to sort. You can also click on View (above the Requested column) for other sorting options.

What are my approver options for Requests and Expense Reports?

Send back Request/Send back to User – Click if any adjustments need to be made to the Request or Expense Report. Add your comments and click Ok.

Approve – Click if you approve the Request or Expense Report as is.

Approve & Forward – Click if you approve the Request or Expense Report, but would like to add an additional approver into the workflow.

How do I view past approvals?

Click on Approvals on the top navigational ribbon. Click on Requests or Reports on the white navigational ribbon (next to Approvals Home). Click on the blue View button and adjust your view settings.

Where are my approvals?














All Concur approvals will be under your **Approvals** tab on the top navigational ribbon.

You will see the number of Requests and Expense Reports pending your approval. Click on the **Request** or **Report Name** to view the document pending your approval.

What am I looking for when approving a Request?

Header	Expense Summary
<ul style="list-style-type: none"> • Dates and Destination • Trip Purpose • Traveler Type - Is this guest or group travel? • Index • Attachments - Is a conference agenda attached? List of group travelers? 	<ul style="list-style-type: none"> • Are all anticipated travel costs included? • Are the travel costs within budget?

Concur Icons

-  Alert
-  Partial index allocation
-  Full index allocation
-  Attendees are included
-  Comments
-  Personal Expense
-  Receipt  Electronic Receipt
-  Travel Card Charge
-     Trip Data

What am I looking for when approving an Expense Report?

<p>Header</p> <ul style="list-style-type: none"> •Click on Details>Report Header. Is a Request attached? In-state overnight, out-of-state, and international travel are required to have a Request. •If no Request is attached, has the traveler explained why? 	<p>Index Allocations</p> <ul style="list-style-type: none"> •Click on Details>Report Header to view index. •If Expense Report has been allocated, click Details>Allocations. Click Summary to view all index allocations. 	<p>Standard Meal Per Diem</p> <ul style="list-style-type: none"> •Click on Details>Expenses and Adjustments to see meal per diem each day. •Are meals provided by the conference excluded? •Are personal days excluded?
<p>Personal/Non-reimbursable expense on Travel Card</p> <ul style="list-style-type: none"> •Is there a receipt attached showing they paid the University back or a Reduction for Personal Expenses on the report? 	<p>Receipts</p> <ul style="list-style-type: none"> •Receipts need to be attached to every expense except Standard Meal Per Diem and Mileage. •Hotel receipts must be itemized show payment. 	<p>Report Totals</p> <ul style="list-style-type: none"> •Are the travel expenses within budget? •View a breakout between reimbursable expenses and travel card charges by clicking on Details>Totals.

Approver Options

Send back Request/Send back to User – Click if any adjustments need to be made to the Request or Expense Report. Add your comments and click Ok.

Approve – Click if you approve the Request or Expense Report as is.

Approve & Forward – Click if you approve the Request or Expense Report, but would like to add an additional approver into the workflow.

Approving on behalf of someone? Access the approvals by clicking on Profile. Search for the person you are approving on behalf of and click Start Session. Click on Approvals on the top navigational ribbon to access their approvals.



Request

Frequently Asked Questions

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General

What is a Request?

A Request is pre-trip approval for in-state overnight, out-of-state, and international university travel. It includes information about the trip and estimates of travel costs. The Request needs to be completed and approved before making travel arrangements.

When is a Request required?

A Request is required for all in-state overnight, out-of-state, and international trips.

Do I need a Request even though the University will not be paying for the trip?

Yes, a request is required if you are traveling on University business for safety and emergency purposes.

Does a Request book my travel?

No. A Request is your approval to travel. Once your Request is approved, you can book travel in the Travel tab of Concur, directly with the State Travel Office, or through a travel booking/airline website.

I have an approved Request. I booked my travel, but I need to re-do my Request. What happens to the travel I have already booked that is connected to that Request ID?

Travel is not cancelled when a request is cancelled. Cancel your approved request and submit a new request for approval.

How can I find my approved request?

Click on Requests on the top navigational ribbon of Concur. If you don't see your request on that screen, click on Active Requests and make another selection from the drop-down menu.

Creating a Request

My destination city isn't available to select from the drop-down. How should I indicate the correct destination?

Enter in the closest city to your destination. In the Comments section of the Request Header type in your destination city.

How do I indicate there are multiple destinations on my Request?

Enter the first destination in the Destination City field. In the Additional Information field, note the additional destinations.

Price Estimates

How do I find price estimates to include on my Request?

Flight – the average flight costs approximately \$350, but varies based on destination and days booked before departure. Do a quick search in Concur for flight prices.

Hotel – the average hotel room costs approximately \$140/night, but varies based on destination and vendor. If you are attending a conference, check to see if there are local hotels that offer discounts for conference attendees.

Rental Car – the average rental car costs approximately \$40/day.

Driving instead of flying – contact the Travel Office for an in-lieu-of-mileage (ILOM) quote when driving 700 or more miles roundtrip

What if actual costs are different from what I estimated on my Request?

Your request is an estimate. Try to estimate your travel expenses as best as you can, but expect some differences in price. It is likely that prices will vary or unexpected expenses will arise while you are traveling. You will account for actual costs on your expense report after travel.

Change Index

How do I change the index on a Request?

The index field is found on the Request Header. Click on Request Details – Edit Request Header. Click in the Index field, enter in the 6-digit index field, and select it from the list. Click Save.

Attachments

How do I attach a document?

Click on Attachments and click Attach Documents. Click Upload and Attach to search for the file and click Upload.

How do I see what documents I have attached?

Click on Attachments and click View Documents.

Drive instead of Fly

I plan to drive instead of fly. How do I include that cost?

Travelers driving 700 or more miles roundtrip must obtain an In Lieu of Mileage (ILOM) quote. Contact the Travel Office at travel@uvu.edu to obtain an in-lieu-of-mileage (ILOM) quote. The Travel Office will compare the cost of mileage vs. the ILOM quote and will instruct you on which cost to include. Travelers driving 700 or less miles roundtrip can add a Mileage expense to the request.

Standard Meal Per Diem

The standard meal per diem on my Request is much higher than I need. How do I adjust it?

Standard meal per diem cannot be adjusted on the Request. If you will be claiming less, add Standard Meal Per Diem to the request and then add a Reduction of Meal Per Diem expense.

Student Meals

I need to pay for students' meals while traveling. What expense type should I use?

Contact the Travel Office at travel@uvu.edu or extension 8965 option 3 before submitting your Request to discuss options for student meals.

Checklist before submitting

What do I need to include on my Request?

A Request contains basic information about the trip such as trip dates, destination, trip purpose, and the index responsible for funding your trip. An estimate of your travel costs also needs to be included. Travel costs may be airfare, hotel, taxi, mileage to/from the airport, and meal per diem.

What do I need to verify before submitting a Request?

1. Is the information on the Request Header accurate? Is the **index** correct?
View and edit information on the Request Header by clicking on **Request Details – Edit Request Header**.

2. Have I included all **anticipated travel expenses** on my Request?
Travel expenses could include airfare, hotel, car rental, mileage to/from the airport, taxis, standard meal per diem, baggage fees, and parking.
Add expenses to the request by clicking on **Add**. Select the expense, enter in estimated amount, and click Save.
3. Have I attached any necessary **documents**?
If you are attending a conference, please attach a copy of the conference itinerary. If you are traveling with a group of students, please attach a list of names and UVIDs of those traveling.
You can attach documents by clicking on **Attachments – Attach Documents**.

Modifying a Request

Can I make changes to an approved Request?

No. You cannot make changes to an approved Request. If you need to make vital changes to your Request, you will need to cancel the Request and submit a new Request for approval.

Can I make changes to a submitted, but not approved Request?

Yes. You can make changes to a Request pending approval if you Recall the Request. Click on Requests on the top navigational ribbon. Click on the request. Click on the orange Recall button. Once adjustments have been made, click Submit.

Request ID

What is a Request ID?

A Request ID is a 4-digit code consisting of numbers and letters. This is a unique code tied to your Request.

Where is my Request ID?

You can find your Request ID by clicking on Requests on the top navigation ribbon. Click on the request. Under the request name you will see your Request ID.

Approval Workflow

How is a Request approved?

Once you submit your Request, it will go to your supervisor for approval. After your supervisor approves your Request, it will go to the responsible party on the index indicated on your Request.

If you are traveling internationally, the request will go the International Travel Office (Center for Global Engagement) for approval.

How do I know when my Request is approved?

You will receive an email from Concur stating the status of your Request is approved. You are also encouraged to check on the status in Concur. Click on Requests on the top navigational ribbon. You will see your Request listed. You can see the status of your Request at the top and bottom of the request tile.

Group Travel Request

Is a Request needed for each group traveler?

If a traveler is a full-time UVU employee and will be using their travel card and/or seeking reimbursement for any expenses, then they need their own Request.

If a traveler is a guest (guest, student, non-UVU employee) and will seek reimbursement for any expenses then they need their own Request.

If no other travelers except for the group leader will be using their travel card and/or seeking reimbursement for any expenses, then all travelers are accounted for on the group leader's Request.

Cancelled Trip

My trip is cancelled, and I did not travel. What do I do with my Request?

Click on your Request and click the blue More Actions button and click Cancel Request. If you don't have any expenses to reconcile, then after cancelling the request, click More Actions and click Close Request.

A **Request** is your **authorization to travel for any overnight, out-of-state, or international trip**. It includes the following information:

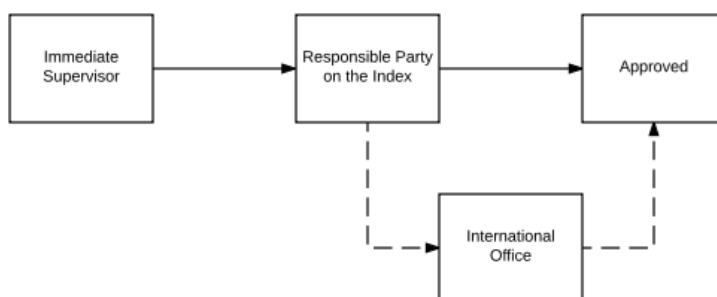
- Trip start and end dates
- Destination
- Index (obtained from supervisor or department administrative assistant)
- Estimated costs (airfare, hotel, transportation, etc.)
- Conference itinerary for conference attendees
- Group/student travel – list of names and UVIDS of those traveling

Before submitting a Request, verify the following information:

1. Do I have the correct ***index*** on my Request?
The index is found on the Request Header. Enter the index and select it from the drop-down search list.
2. Have I included my ***anticipated travel expenses*** on my Request?
Travel expenses could include airfare, hotel, car rental, mileage to/from the airport, taxis, standard meal per diem, baggage fees, and parking.
3. Have I attached any necessary ***documents***?
If you are attending a conference please attach a copy of the conference itinerary. If you are traveling with a group of students please attach a list of names and UVIDs of those traveling.
You can attach documents by clicking on Attachments. You may need to click Save before this button will appear.

Request Workflow:

When a Request is submitted, it is approved 1) by your supervisor, and then 2) by the responsible party on the index indicated on the Request. If you are traveling internationally, the Request will also go to the Office for Global Engagement (internationaltravel@uvu.edu) for approval.



For more details, see the **Request User Guide & Request FAQs** on myUVU>Employees>Purchasing and Travel.



Expense Report

Frequently Asked Questions

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General

What is an Expense Report?

An Expense Report is a report associated with an in state overnight, out-of-state, or international trip that reconciles all travel card charges and reimburses the traveler for any out-of-pocket costs.

When is an Expense Report required?

An Expense Report is required for every in state overnight, out-of-state, or international trip where a travel card is used and/or reimbursement is requested.

When should an Expense Report be completed and submitted?

It is University Policy for expense reports to be completed and submitted with thirty days (30) of return. The University may not honor expense reports not completed and submitted within that timeframe, and any travel card charges may be deemed personal and be required to be paid back to the University.

Guest/Student Expense Report

How do I reimburse a student or guest for expenses?

When completing an Expense Report select Guest or Student as the Traveler Type. A Guest/Student Traveler UVID field will appear. Enter the student or guest's UVID. This will ensure the reimbursement will go to the student or guest instead of the user.

Group Expense Report

Can I reimburse more than 1 person on an expense report?

No. Only 1 person can be reimbursed on an expense report. Individual expense reports need to be created to reimburse each traveler.

Creating an Expense Report

What date should I use as the transaction date?

The date the purchase was made.

What city should I use as the City of Purchase?

The city in which the purchase was made.

Starting an Expense Report

How do I start an expense report?

Start an expense report from the Request. Click on Requests on the top navigational ribbon. Look for your Request. If you don't see the request, click on Active Requests and select Approved Requests or All Requests from the drop-down menu.

I don't have an approved Request. How do I complete my expense report?

Making and paying for travel arrangements and traveling without an approved Request is a violation of University Travel Policy. Complete your expense report without an approved Request by clicking on Expense>Create New Report. Your expense report will be under review with the Travel Office for the policy violation.

Standard Meal Per Diem

I clicked “No” when asked if I needed to include standard meal per diem on my report. How do I add it to the report?

Click on Travel Allowance – Manage Travel Allowances. Click Create New Itinerary. Create the itinerary to add standard meal per diem to the report.

I am trying to create an itinerary for standard meal per diem, but the travel dates are grayed out. What should I do?

If the dates are grayed out, you already have an itinerary created for those dates. To find your itinerary click on Travel Allowance – Manage Travel Allowance.

Is there an itinerary on the top of the screen under Assigned Itineraries? If so, click on the Expenses & Adjustments tab. Adjust your meal per diem if needed and click Create Expenses. If your itinerary is on the bottom of the screen under Available Itineraries click on it and click Assign. Click Next. Adjust your meal per diem if needed and click Create Expenses.

If you are creating expense reports with standard meal per diem for more than one guest (student, part-time employee, non-UVU affiliated personnel), different dates for the meal per diem itinerary need to be selected. Select the correct dates on the itinerary for the first guest and then select dates the week prior for any other person who traveled.

Why are my meal per diem amounts lower on my departure and return days than the other days?

You are only given 75% of your daily meal per diem on departure and return days.

How can I find out what my meal per diem amounts are?

UVU uses U.S. General Services Administration rates. These rates vary based on your destination. Visit <https://www.gsa.gov/travel/plan-book/per-diem-rates> to look up rates.

How do I exclude all meal per diem for one day?

Click on the check box under the Exclude column for the corresponding day.

I am getting the warning: “This report could not be submitted. The expense report contains at least one itinerary with a single itinerary row.” What does this mean and how do I fix it?

This warning means the itinerary for standard meal per diem was created incorrectly.

Click on Travel Allowance – Manage Travel Allowance. Click on your itinerary and click Edit. Click on the itinerary stop you have created (left side). Adjust the date under Arrival City to be the date you arrived in the arrival city. Click Save. Your departure and arrival cities will be populated. Enter in the date and approximate time you departed, and the date and approximate time you arrived back in Utah. Click Save. Click Next. Make any adjustments to your meal per diem and click Update Expenses.

Personal Days

How do I handle personal days on my expense report?

Personal days are not allowed on an expense report. The start and end travel dates on the report header (Report Details – Report Header) are the business portion of the trip. The itinerary dates for standard meal per diem are the business portion of the trip.

[Drive instead of Fly](#)

I choose to drive instead of fly on my recent trip. How do I add that expense into my report?

If the roundtrip mileage equals 700 or more miles, you need an in-lieu-of-mileage (ILOM) quote from the Travel Office. This quote compares the cost of flying to driving. Per policy, you are reimbursed the lesser cost.

If the cost of mileage is less, add a Mileage expense to your report, and attach your ILOM as the receipt.

If your ILOM quote is less, add an In Lieu of Mileage expense to your report, and attach your ILOM as the receipt.

[Hotel Itemizations](#)

How do I itemize a hotel when the room rate changed?

Click on the Hotel expense. Enter the Check-in Date and Check-out Date. Click the Itemizations tab. Click Create Itemizations. Select Hotel from the expense type drop-down menu. Click the Not the Same tab. Enter the Room Rate and Tax for each night and click Save Itemizations.

I have itemized my hotel but have a rounding balance. How do I fix this?

Click on the Hotel expense. Click the Itemizations tab. Click on a Hotel Tax itemization, change the amount, and click Save Itemization.

[Travel Card Charges](#)

How do I add travel card charges to my report?

Click Add Expense. Under the Available Expenses section, you will see the travel card charges listed with US Bank as the payment type. Select the charges and click Move.

My travel card charges are not showing under Available Expenses in Concur. What do I do?

Travel card charges usually take 5-7 business days to load into Concur. If the transaction occurred on the weekend, it can several more days. Wait for all travel card charges to load into your profile before submitting an expense report.

Do I need to wait to submit my expense report until all travel card charges have come into my Concur profile?

Yes. Wait until all charges come into your Concur profile. Once all charges are in your profile add them to your expense report.

[Out-of-pocket expenses](#)

How do I add out-of-pocket expenses?

Click on Add Expense. Click Create New Expense and select an Expense Type from the list. Fill in all the required fields, attach the corresponding receipt, and click Save to add to the report. If adding additional out-of-pocket expenses to the report, you can click Save and Add Another to continue.

[Attaching Request](#)

How do I attach my Request to my Expense Report?

If you did not create the expense report from the request, the request is not attached to your report. Click on Report Details – Manage Requests. Click Add. Select the request and click Add to Report.

Checklist before submitting

What do I need to verify before submitting an Expense Report?

1. Your Request is attached.
2. The start and end dates correct?
3. The index is correct or you have allocated to the correct indexes.
4. All travel card charges are included.
5. All out-of-pocket expenses are included.
6. Every expense except Standard Meal Per Diem and Mileage has a receipt attached.

Receipts

How do I attach a Receipt to an expense?

Click on the expense. Click Upload Receipt Image. You can see either choose a receipt from your Available Receipts or browse for a file saved on your computer.

I have lost a receipt for an expense on my report. What do I do?

You will need to complete a Missing Receipt Declaration.

You can do this by clicking on Receipts and Missing Receipt Declaration. Select the expense that is missing a receipt. Click Accept and Create. Missing Receipt Declarations cannot be created for airfare, rental car, or hotel expenses, or be created by a delegate.

What do I do with paper receipts?

If you have the Concur mobile application then you can take a picture of the receipt. The image of the receipt will be listed under Available Receipts in the Concur app and on your Concur profile.

You can also scan paper receipts and save the file to your computer.

Are receipts required for every expense?

Yes, every expense except Standard Meal Per Diem and Mileage requires a receipt.

How do I view a receipt attached to an expense?

There are 2 ways. 1) Click on the Expense and the receipt image is on the right-hand side of the screen. 2) Click on the receipt thumbnail on the expense.

Modifying an Expense Report

Can I modify an expense report once I have submitted it?

Yes, if the expense report is not fully approved. If the expense report is pending approval, click Recall. Make the changes and resubmit.

Can I modify an expense report once it is approved?

No. Once an expense report is approved it cannot be modified.

Cancelled Trip

I didn't go on my trip. Do I need to complete an expense report?

If you have travel card charges or out-of-pocket expenses to reconcile, then you must complete an expense report. You must also reconcile any travel card charges and refunds.

Amount of Reimbursement

How do I know what amount is being reimbursed to me?

Click on Report Details and Report Totals. Under Company Pays, the amount above Employee is the reimbursement.

Allocating

How do I allocate expenses to a different index?

Click on the expense. Click Allocate. Click Add. Search for the index and select it from the search results. Click Save. The index will be listed. Click Save again.

Approval Workflow

How do I know where my Expense Report is in the approval process?

Click on Expense. Under Active Reports you will see your recently submitted expense reports. At the bottom of the expense report tile, you will see the current workflow step for the report. You can also see this information by clicking into your report. Click on Report Details – Report Timeline.

Returned Reports


I received an email saying my expense report was returned to me. What does this mean and what should I do?


When an expense report is returned to you, it means there are changes you need to make to the report. In the email you will see comments explaining why the report was returned. You can also see the comments by clicking on the report. At the top of the report, you will see Returned and the comments.



Alerts

There are alerts/warnings on my expense report. What does this mean?

A yellow triangle alert () will not prevent an expense report from being submitted. Review the alert. Add comments to expenses that need clarification.

A red exclamation alert () will prevent an expense report from being submitted. Review and resolve the alert.

Past Expense Reports

How do I look at past expense reports?

Click on Expense. Click on Active Reports. Select another view option from the drop-down menu.

Print/Email

How do I print or email my Expense Report?


Click on Print/Email and click UVU-Detailed Report with Summary Data. You have the option to save as a PDF, email, or print.

An **Expense Report** reconciles travel card charges and out-of-pocket expenses associated with each trip. It includes the following information:

- Travel Card charges
- Out-of-pocket expenses
- Receipts for all expenses

To start an Expense Report, **find the Request** and click on it. **Click Create Expense Report.**

Before submitting an Expense Report verify the following information:

1. Is my **Request attached** to my Expense Report?
You will see your attached Request by clicking on Report Details – Manage Requests. The request will be listed if it's attached. To add a request, click on Add. Select the request and click Add to Report.
2. Are the **start and end dates** on the Report Header correct?
Click on Report Details – Report Header. Review the start and end dates and make any adjustments. Click Save. These dates should only include the business portion of the trip.
3. Do I have the correct **index** on my Expense Report?
If you have not allocated expenses, then the costs on your Expense Report will post to the index listed on your Report Header. Click Report Details – Report Header. You will see the index in the Index field. To change the index, click on that field and enter in the correct index. Click Save.
If you have allocated expenses, then click on Report Details – Allocation Summary to review.
4. Have I included all **travel card charges** on my Expense Report?
To view Travel Card charges that not been added to an Expense Report, click Add Expense. Travel card charges are listed in the Available Expenses section and are listed with the US Bank Payment Type. To add an expense to a report, select it and click Add to Report.
5. Have I included all **out-of-pocket charges** on my Expense Report?
To add an out-of-pocket charge (except meal per diem) click on Add Expense. Click Create New Expense. Enter the required information and click Save.
6. Have I included all **receipts** on my Expense Report?
All expenses except Standard Meal Per Diem and Mileage require a receipt. An expense with an attached receipt will show a thumbnail picture of the receipt in the Receipt column.
An expense that does not have a receipt attached has this icon: 
Are the attached receipts readable? Do the receipts contain all necessary information (vendor name and address, date of purchase, itemization of charges, amount paid, and payment information)?

Standard Meal Per Diem – Create an itinerary to add meal per diem. (Travel Allowance – Manage Travel Allowance)

Warnings/Exceptions – Red exclamation warnings need to be resolved before submitting. Yellow triangle warnings need to be reviewed, but will not prevent you from submitting.

Expense Report Workflow:

An Expense Report is approved by 1) an external system, 2) the Travel Office, 3) supervisor, 4) the responsible party on the index, and 5) Accounting.

For more information, see the **Expense Report section** on myUVU>Employees>Purchasing and Travel.