

Concur Travel Request Overview

SAP Concur 

Table of Contents

TABLE OF CONTENTS

1. [Introduction To Concur & Travel](#)

1A. - Welcome to Concur Travel for UConn

1B. - Logging into Concur

1C. - Concur Home Page

1D. - Travel Profile

1E. - Airfare Price Comparison Requirements

1F. - Personal Information - Setting Up Your Profile

1G. - Travel Card Information

1H. - Travel Card vs. Pro Card

2. [Pre-Trip: What to Know!](#)

2A. - Things to know before you go! | Best Practices for Travel and Booking

2B. - Meals - Per Diem vs. Actuals

2C. - Meals – Applies to SFA Faculty, Staff, Students

2D. - Expected Expenses

2E. - International Travel Information (Policies & Waiver)

2F. - Fly America Exception/Waiver

3. [Shopping For Rates - Before the Travel Request](#)

3A. - Shopping for Flight Options (Round Trip, One Way or Multi-City)

3B. - Shopping - Flight or Train Selecting

3C. - Shopping, Reviewing and Reserve Flight or Train

3D. - Shopping for Car Rental & Selecting

3E. - Shopping for Hotel & Selecting

4. [Delegates](#)

4A. - Concur|Adding a Delegate

4B. - Concur|Working as a Delegate

SLIDE

3

4

5

6-7

8

9-11

12-18

19

20-21

22

23-26

27-28

29

30-34

35

36

37

38-39

40

41-42

43-44

45-47

48

49-51

52-56

5. [Group Travel](#)

5A. Group Booking

6. [Guest - Pre-Approvals & Payments](#)

6A. - Guest - Pre-Approvals & Payments

7. [The Travel Request](#)

7A. - Concur Request

7B. - Start a New Travel Request

7C. - Request Headers/Create New Report

7D. - Concur|Single Day Travel Allowance

7E. - Travel Details

7F. - Request Details

7G. - Submitting A Request

7H. - Copying a Previous Request

7I. - Closing a Request

7J. - Cancelling or Changing Airline, Rental Car or Hotel Reservation

8. [The Full Request Process](#)

8A. - The Full Request Process

9. [Workflow, Timelines & Approving Requests](#)

9A. - Travel Request Approval Workflow

10. [AAUP/OVPR Travel Award](#)

10A. - Receiving an AAUP/OVPR Travel Award

10B. - Professional Development Fund Award Program

10C. - Scholarship Facilitation Fund Guidelines

57

58-59

60

61-63

64

65

66

67-70

71-72

73-74

75

76

77-79

80-81

82-83

84

85-91

92

93-101

102

103-113

114

115

Intro to Concur & Travel



Welcome to Concur Travel for UConn

[Anthony Travel](#) is the University's Travel Management Company.

Should you need assistance from one of our travel agents, please feel free to contact our team:

- **Hours:** Monday - Friday, 8 AM to 5:30 PM EST
- **Phone:** (860) 325-2558
- **Email:** UConnCampusTravel@anthonytravel.com

Services including, but not limited to: new booking requests, post-booking changes or cancellations, and general travel itinerary queries.

Emergency Assistance (outside of business hours)

For urgent travel-related issues which cannot wait until the next business day, you can contact the Anthony Travel emergency after-hours service:

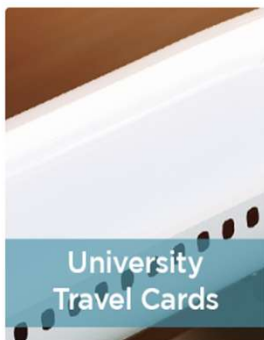
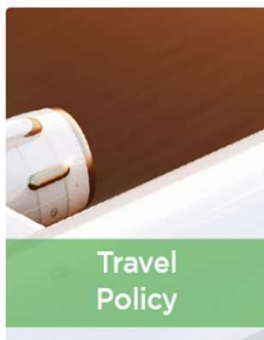
- **After-Hours Phone:** (800) 523-5819

Traveling with multiple UConn travelers on the same itinerary?

Contact the Anthony Travel team using the information below:

- **Phone:** (860) 325-2558
- **Email:** UConnCampusTravel@anthonytravel.com

Logging Into Concur?



1. Navigate to Concur Web browser – www.travel.uconn.edu
2. Login to Concur Travel & Expense.



Submit



Verify



Travel

Concur Home Page

1. SAP Concur Menu	This dropdown section displays various categories so you can navigate to a desired section, focusing on features exclusive to the selected topic. For example, click Requests from the dropdown to navigate to a view displaying Request specific information.
2. Quick Task Bar	This section provides Quick Tasks (links) so you can quickly access features such as: start a new report, open reports and requests, and manage available expenses.
3. Trip Search	This section provides the tools you need to book a trip, such as: flights, hotel, and car rental.
4. Company Notes	This section includes important, up-to-date, UConn Travel and Expense related information.
5. My Tasks	This section shows your available expenses, open reports, and any approvals requiring your attention.
6. My Trips	This section displays your upcoming trips
7. Help	This dropdown has links to Concur related reference material.
8. Profile	This section stores personal information used for booking travel, streamlining the request process, and for building expense reports.

Concur Home Page - 1

The screenshot displays the SAP Concur Home Page for UCONN. The page is annotated with red callout boxes and arrows numbered 1 through 8, highlighting various features and data points.

1: SAP Concur logo and Home dropdown menu.

2: Action buttons: Start a Request, Start a Report, Enter Reservation, 01 Authorization Requests, 00 Available Expenses, 01 Open Reports.

3: Trip Search section, including Booking for myself | Book for a guest, icons for flight, car, hotel, and train, and a reminder: "Reminder! You may now book travel at any time; however, you may not begin your trip without a fully approved Travel Request."

4: Company Notes section, titled "Worldwide Caution", with a "Read more" link.

5: My Tasks section, showing 01 Open Requests, 00 Available Expenses, and 01 Open Reports.

6: My Trips (0) section, indicating "You currently have no upcoming trips."

7: Help and user profile icons.

8: User profile icon.

My Tasks Data:

Task	Count	Details
Open Requests	01	09/18 test \$400.00 — Travel
Available Expenses	00	You currently have no available expenses.
Open Reports	01	10/31 test \$400.00

Travel Profile

If you've never logged into Concur before, this will be the first screen you will see. If you have logged in before, this screen will not be shown.

Welcome to Concur!

Please take a minute to fill out your travel profile online, so we can make your trip planning easier. You may click the Go to the Profile page button below to access your profile, fill in your personal and travel preference information, and then you will be ready to book travel!

If you have previously submitted a profile, changes have been made that require you to save it again.

Please check the values to be sure they are correct and resubmit.

Thank you.

The following required profile fields/sections need to be completed:

- Middle Name
- Work Phone or Home Phone
- Mobile Phone
- Country Calling Code (Mobile Phone)
- Gender
- Date of Birth

[Go to the Profile page](#)

[Return to Travel Center](#)

1. Navigate to the Profile page – [Click Here](#)
2. Complete Profile Information
3. If Profile is already completed – Return to Travel Center

Airfare Price Comparison Requirements –1

Overview

This document provides information regarding requirements a traveler will follow when combining a business trip with personal travel to ensure airfare reimbursement is seamless.

Cost Comparison Requirements

Cost comparisons are required for all travel when a business trip is combined with personal travel. When personal and business travel is combined, the traveler will only be reimbursed for expenses equal to or less than the cost incurred for the business portion of the airfare (excluding personal travel).

Cost comparisons must be captured the same date that the airfare is booked. Cost comparisons should provide a reasonably priced flight, consistent with the time necessary for the business travel.

Acceptable cost comparison documentation is a printed list of airfare options from the Concur online booking tool.

Note: If personal travel costs exceed business travel, the traveler will be asked to provide a personal card to split payment for the personal portion of the airfare cost.

1. *On the same day as obtaining the price comparison, the flight should be booked.*
2. *Save the cost comparison, to later attach to the respective expense report when submitting for reimbursement.*

Airfare Price Comparison Requirements - 2

Concur Travel Online Cost Comparison

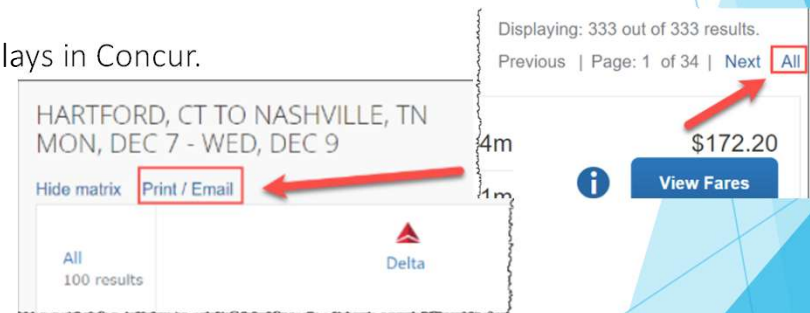
1. From the Concur homepage, navigate to the **Trip Search section**. The Air tab is selected by default.
2. Enter the flight related information and search for available flights for the business only dates. Please do not provide the combined personal/business dates.

For Example, if the business only is when you would have traveled Monday through Thursday, but you are staying until the following Sunday then the search should be for the airfare departing Monday and returning Thursday.

3. Save the complete list of flight options, as it displays in Concur.

To save the complete list of flight options:

- a. Click the **All link**, above the list of airfare results. The complete list of flight options display.
- b. Click **Print/Email**, above the Matrix.



Airfare Price Comparison Requirements - 3

The Air Availability/Fare Quote window displays.

- c. Click **Print Flights**.
 - d. Confirm the **Destination** field displays **PDF**.
 - e. Confirm the **Pages** field displays **All**.
 - f. Click **Save** and then complete the steps needed to save to your computer.
4. When completing the respective expense report, attach the saved Concur flight comparison document before submitting for reimbursement.

Note: If an airfare comparison is not obtained from the University's preferred agency at time of booking, airfare reimbursement (i.e., business travel) may result in the University not reimbursing the cost of the airfare.

Personal Information - Setting Up Your Profile

1. From the Concur homepage, click **Profile** and then click **Profile Settings**. The Profile Options view displays.

It is important to update your personal information to ensure accuracy and to activate various Concur features.

Fields marked **[Required]** must be completed.

The **[Required]** fields include:

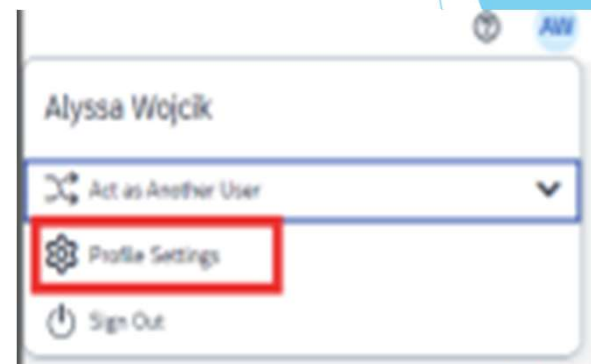
- **Middle Name,**
- **Contact Information** (Work or Home Phone),
- **Gender,** and • **Date of Birth**

It is highly recommended to complete other Personal Information fields, such as: Work and Home Address, Email Address Verification, Travel Arrangers, and Credit Cards.

Review all fields for accuracy and update, as appropriate.

2. From **the Profile Options** view, click **Personal Information**.
3. Review the First Name, Middle Name, and Last Name fields to ensure this information matches the photo identification you will present at the airport.

Note: Grayed out fields are not editable. If there are errors in these fields, email travel@uconn.edu for help.



Personal Information - Setting Up Your Profile - 2

Contact Information

1. Complete all **Work Address** fields.
2. Complete all **Home Address** fields.
3. Either a **Work Phone** OR **Home Phone** is required. Both can be entered, as desired.

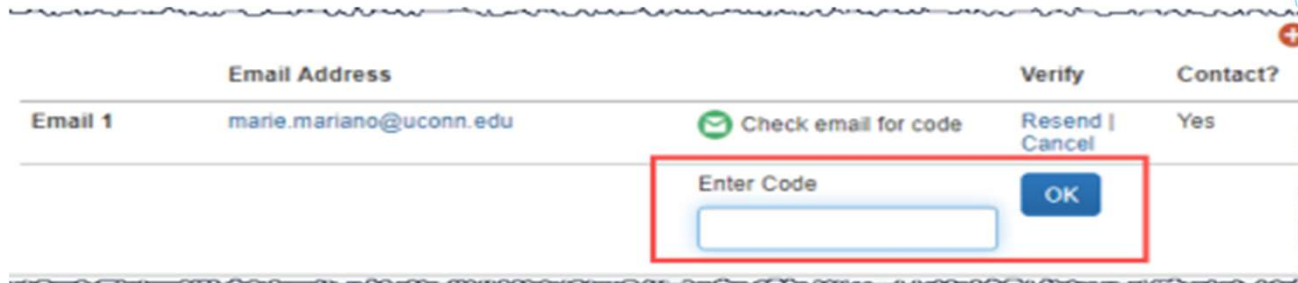
Note: Fields marked [Required] must be completed before you can save your profile. You do not need to save after each section.

The screenshot displays a web form with three main sections: Work Address, Home Address, and Contact Information. Each section has a 'Go to top' link in the upper right corner and a 'Save' button at the bottom.

- Work Address:** Includes fields for Company Name (T2 IRT MVP), Assigned Location (Please choose a company location), Street (Address same as assigned location), City, State/Province, Postal Code, and Country/Region (United States of America).
- Home Address:** Includes fields for Street (178 Main St), City (Falls Church), State/Province (VA), Postal Code (22097), and Country/Region (United States of America).
- Contact Information:** Includes fields for Work Phone [Required**], Work Extension, Work Fax, 2nd Work Phone/Remote Office, Home Phone [Required**], Pager, Other Phone, Mobile Phone Country/Region, and Mobile Phone. A red note at the bottom states: "**You must specify either a home phone or a work phone."

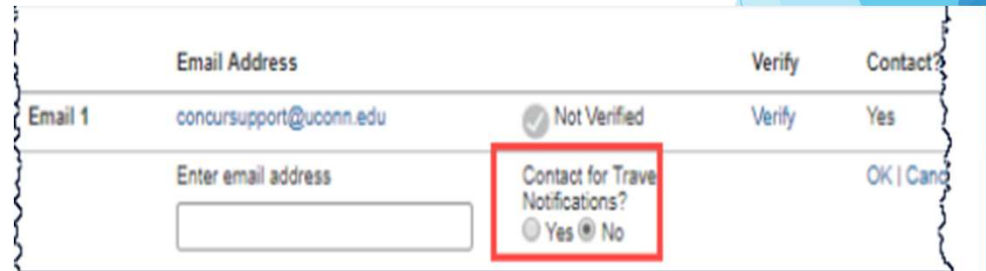
Personal Information - Setting Up Your Profile - 4

- Copy the Verification Code from the email you receive.
- Paste the Verification Code in the **Enter Code** field (under the Email Addresses section of your Profile in Concur).



The screenshot shows a table with columns for 'Email Address', 'Verify', and 'Contact?'. The first row is labeled 'Email 1' and contains the email address 'marie.mariano@uconn.edu'. Below the email address, there is a green envelope icon and the text 'Check email for code'. To the right of this, there are links for 'Resend | Cancel'. Below these elements, there is a text input field labeled 'Enter Code' and a blue 'OK' button. A red box highlights the 'Enter Code' field and the 'OK' button.

- Click **OK**. A confirmation message displays.
- Click **OK** again.
- If you plan to use other email accounts to send itineraries, outlook invitations, and/or receipts, click **Add additional Email** and then **Verify**, as necessary.



The screenshot shows a table with columns for 'Email Address', 'Verify', and 'Contact?'. The first row is labeled 'Email 1' and contains the email address 'concursupport@uconn.edu'. To the right of the email address, there is a checkmark icon and the text 'Not Verified'. Below this, there is a link for 'Verify'. To the right of the 'Verify' link, there is a link for 'OK | Cancel'. Below these elements, there is a text input field labeled 'Enter email address'. To the right of the input field, there is a section titled 'Contact for Travel Notifications?' with two radio buttons: 'Yes' and 'No'. A red box highlights the 'Contact for Travel Notifications?' section.

Note: Select Yes for the Contact for Travel Notifications options, as desired.

Personal Information - Setting Up Your Profile - 5

Eligible for the following discount travel rates/fare classes
 AAA/CAA Government Military Senior/ARP

Travel Preferences

Seat: Seat Section: Special Meals: Ticket Delivery:

Preferred Departure Airport: Other Air Travel Preferences:

Medical Alerts:

Hotel Preferences

Room Type: Smoking Preference: Foam pillow Message to Hotel Vendor:

I prefer hotel that has:
 a gym a pool a restaurant room service Early Check-in

Accessibility Needs
 Wheelchair access Blind accessible

Car Rental Preferences

Car Type: Smoking Preference: Car Transmission:

Message to Car Rental Vendor:

Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs Add a Program

No programs defined

My travel network, all your reward programs connected in one place
By connecting your reward programs, if you book with participating providers, you'll receive your negotiated rates and member not a member, and your travel plans are free on the line, with Power of Travel

10. Complete all **Emergency Contact** fields.
11. Review the **Travel Preferences** section. Update as desired.
12. TSA Secure Flight
13. Complete the **Gender** and **Date of Birth** fields, as these are **Required** fields.

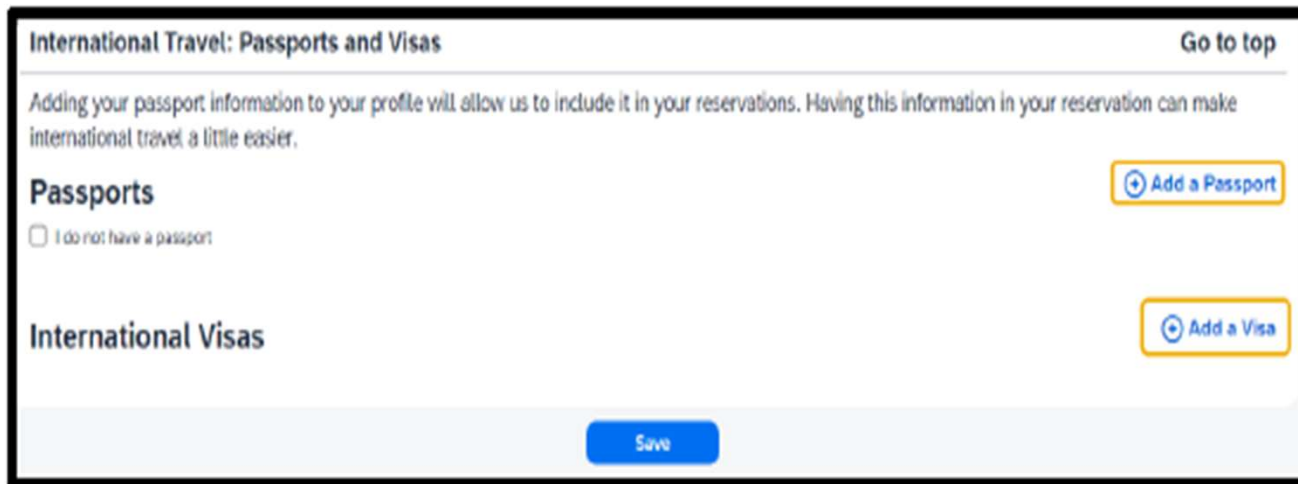
TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.
Note: If you have a Global Entry account, please enter that in the TSA Pre-check "known traveler number" space provided below.

Gender [Required] <input type="radio"/> Male <input type="radio"/> Female	Date of Birth (mm/dd/yyyy) [Required] <input type="text" value="mm/dd/yyyy"/>	DHS Redress No ⓘ <input type="text"/>	TSA Pre✓ Known Traveler Number ⓘ <input type="text"/>
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Personal Information - Setting Up Your Profile - 6

14. Complete the remaining **TSA Secure Flight** fields, as applicable.
15. International Travelers should complete **Passport** and **Visa** fields.



The screenshot shows a web form titled "International Travel: Passports and Visas" with a "Go to top" link in the top right corner. Below the title is a descriptive paragraph: "Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier." The form is divided into two main sections: "Passports" and "International Visas". Under the "Passports" section, there is a checkbox labeled "I do not have a passport" and a yellow button with a plus icon and the text "Add a Passport". Under the "International Visas" section, there is a yellow button with a plus icon and the text "Add a Visa". At the bottom center of the form is a blue "Save" button.

Personal Information - Setting Up Your Profile - 7

Assistant and Travel Arrangers

Assistants and Travel Arrangers are designated individuals that can assist you with the travel booking process.



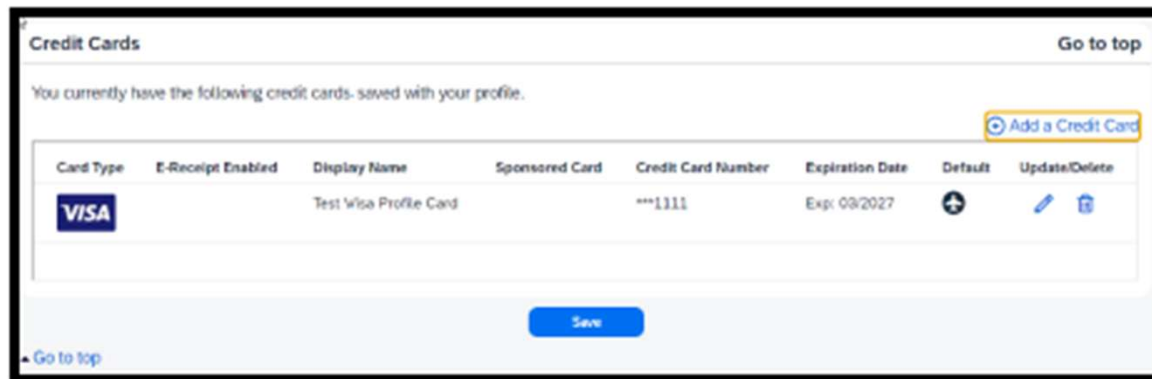
1. To add an Assistant/Travel Arranger, click **Add an Assistant** link. The **Add an Assistant** screen displays.
2. Type the UConn employees name in the **Assistant** field. A filtered search result displays.
3. Select a valid name from the dropdown.
4. Check off other options, as applicable and then click **Save**.

Personal Information - Setting Up Your Profile - 8

Credit Cards

A credit card is required in your profile to allow you to book travel through Concur.

1. Click the **Add a Credit Card** link. A prompt displays.
2. Enter your UConn Travel Card information, as applicable.
3. Enter in your Travel Card information, should a Travel Card not be available, enter personal credit card.
4. After the card is added, press the Update pencil icon to make the card of your choosing the default for Plane, Rail, Car Rentals, and Hotels. This allows Anthony Travel to assist with booking using this card.



Travel Card Information

Need A Travel Card?

- If you do, here are the steps for applying for one
 - [Travel Card Training](#)
 - [Travel Card Request Form](#)

Travel Card vs. Pro Card

The University backed Travel card and Pro-Card programs provide a payment avenue for UConn employees and students and are both reconciled via Concur.

Travel Card

The main use of the UConn Travel Card is for purchasing and paying for expenses directly related to Travel, such as airfare, car rental, hotel etc., this also includes virtual conference registration fees.

Pro-Card

The UConn Pro-Card is an extremely efficient and effective method of purchasing and paying for goods and services with a value less than \$4,999.99 and is designed to more efficiently meet your purchasing needs and those of the University.

Approved Uses

The following are examples of the types of items that may be purchased with the Travel Card and the Pro-Card.

Travel Card Approved Uses	Pro-Card Approved Uses
Airfare	Advertisements
Hotel	Animal feed and bedding (purchase of animals is prohibited)
Train (Amtrak, etc.)	Catering services (held at UConn locations only, where a signed contract is not required)
Car Rental-Fuel for Rental	Conference registrations with department dean/director approval, where travel isn't involved.
Baggage Fees	Dues and professional membership(s) – (business, technical, professional and institutional memberships only)
Conference Registrations (Includes virtual conferences)	Floor and window treatments
Individual Meal Costs (If not claiming Per Diem)	Food (take out or grocery store purchases for student activities & official business meetings held at a University campus location only). Must provide business purpose, list of attendees and agenda, as well as completed Business Meal Pre-Approval Form for staff only meetings.
Gratuities	Gasoline (state vehicles only)
Ground Transportation	Hardware supplies
Taxis – Uber/Lyft, etc.	Internet purchases for approved items only (must be a secure site)
Local train services (e.g., MetroNorth, MBTA, etc.)	Lab chemicals must follow EH&S procedure
Tolls	Maintenance service/repairs
Parking	Office, laboratory and educational supplies (items not available through Central Stores and HuskyBuy)
Business Meals (review approval guidelines in the Travel Policy)	Postage (non-metered mail up to \$50.00 value)
	Software and computer supplies for installation on and use with University owned devices only
	Subscriptions (departmental use only)
	Tools, fixtures and miscellaneous apparatus

Travel Card vs. Pro Card – 2

Restricted Purchases

The following purchases are restricted:

Travel Card Restricted Purchases	Pro-Card Restricted Purchases
Alcoholic beverages	Alcoholic beverages
Personal / Non business-related charges	Animals
Personal car gas	Business, travel, and entertainment related expenses
Cash advances of any type	Cash advances of any type
Charges NOT in full compliance with University travel policy, are considered restricted	All phone and related monthly charges
	All clothing (including t-shirts and hats for promotional use)
	Computers (any value, including iPad, iPod, Netbooks, Nook, Kindle, and tablets)
	Construction and renovation services (includes anything that requires installation)
	Contract agreements of any type or value that involve a signature
	eBay or any other auction website
	Equipment (valued over \$4,999.00)
	Food & beverages consumed at vendor's location (i.e., eating in at a restaurant or eating at an off-campus location. Only take-out food and non-alcoholic beverages are allowed)
	Furniture of any type
	Gifts/Donations (including flowers, cards, gifts for life events, gifts for students, and gifts for milestones)
	Gift Cards – MUST submit Gift Card Preapproval Form, found on HuskyBuy Shopping Home Page and receive prior approval
	Internet service providers
	Past due invoices or invoice payments when payment method was not identified at the time of purchase (considered unauthorized)
	Items prohibited from purchase under grant or research contract
	Leases & lease purchases or any other time payment
	Moving services
	Personal use items (i.e., attachés, folios, pen/pencil sets, etc.)
	Items purchased to furnish a home office
	Precious metals
	Prescription drugs and controlled substances
	Printing services including signage
	Radioactive Materials
	Reimbursements of any type

Pre-Trip: What to Know!

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. The shapes are primarily triangles and polygons, creating a dynamic, layered effect. The text is centered in a clean, blue, sans-serif font.

Things to know before you go! | Best Practices for Travel and Booking

Travel & Entertainment Policy

Air

1. Review your itinerary within 24 hours (window for voiding without penalty) of booking on Concur or on the phone with your UConn designated travel agency. Immediately notify UConn's designated travel agency of any discrepancies found once you receive your email confirmation.
2. Whenever possible, avoid changing your reservation once it has been ticketed. Airline change fees can substantially increase the overall cost of the ticket.
3. Always cancel any ticket prior to the departure of the outbound flight if you won't be using it. If this is not done, in most cases, the ticket retains no value for future use.
4. Make reservations 6-8 weeks prior to travel if possible. This enables you to take advantage of lower fares, as well as increases the possibility of getting your preferred seat assignment.
5. When making reservations, choose the least expensive nonrefundable fare. Refundable fares are often double or triple the nonrefundable rate.
6. If possible, use the same airline for the entire trip. Changing airlines usually results in one-way tickets, which are generally more expensive.

Things to know before you go! | Best Practices for Travel and Booking - 2

Air (Continued)

7. Whenever possible, combine business trips. Several stops on one trip or visiting multiple clients/recruits/etc. in the same city will generally be less costly than two round trips.
8. When possible, schedule midday meetings. This often enables you to avoid peak times at airports.
9. Based on the possibility for flight delays, make sure you have extra time between your flight arrival and you're meeting or event. It is advisable to book one flight earlier than your intended arrival time so there is a backup flight in case of delays or cancellations.

Things to know before you go! | Best Practices for Travel and Booking - 3

Hotel

1. If you need to cancel your room after you have made your reservation, be sure to cancel it prior to the cancellation deadline to avoid penalties. Hotels will usually charge a minimum one-night room penalty (sometimes more than one night) for “no-shows”.
2. Nonrefundable prepaid hotel stays may be lower in cost, however, because changes may occur with travel, we do not recommend you book this type of rate as this would result in the total loss of the prepaid amount.
3. Some hotels will include a complimentary breakfast with your room stay. Take advantage of this if possible as it can be an easy and convenient option.
4. Business hotels usually offer transportation shuttles to major business areas, or they can assist travelers with securing taxis if you decide not to book a car rental.

Things to know before you go! | Best Practices for Travel and Booking - 4

Car Rentals

1. UConn's preferred car rental company is Enterprise/National. The contract Loss Damage Waiver (LDW) and Liability coverage in the rate.
2. GPS systems are helpful but cost approximately an additional \$10 to \$20 per day. You may need prior approval from your department before you request it. (Most cell phones have a Maps app you can use instead.)
3. Car rentals are based on a 24-hour clock. For example, if you pick up your vehicle at 9:00 a.m. on Monday and return it at 10:30 a.m. on Tuesday, you'll usually be charged for two full days.
4. Before you drive away from the pickup station, inspect the car carefully for body damage. Be sure the lights and turn signals are working properly and check the mileage odometer.
5. Always fill the tank yourself before returning the vehicle, so you're only paying for the gas you used.
6. An extra fee is usually charged if a car is returned to a different location than where it was picked up. Make sure you are aware of any drop-off charges.
7. Adding more than one driver to your rental agreement often carries a surcharge.

Meals – Per Diem vs Actuals

SFA Per Diem Policy

We have seen an increase in the number of travelers attempting to claim Per Diem reimbursement in combination with Individual Actual Meals on the same expense report. Travelers must choose to use either the **Per Diem or Actuals** method for meal expenses on a single trip.

What are the Actuals and Per Diem methods?

Actuals – The maximum reimbursement for actual meal costs, including tax and tips.

- Each meal expense is added to a Concur expense report under the expense type of Individual actual Meals.
- Receipts are required for expenses over \$25.00 out of pocket or over \$50.00 if purchased using the UConn travel card.
- The allowable amount is calculated daily and is not aggregated over the entire period of the trip.

Per Diem – Daily allowances paid to employees to cover meal costs incurred while on a UConn business trip. The Daily allowance or Meal Per diem is added to the Concur expense report via creation of a Travel Allowance Itinerary. Travelers using this method would NOT be eligible to use their travel card for individual meal purchases on the same trip.

Note: When using either method the amount may not exceed the daily limits, based on the meal per diem rates published by the GSA the allowance applicable to the first and last day of travel will be 75% of the full day Per Diem.

How can travelers seek Per Diem reimbursement?

- Per Diem reimbursements for **Employees** should be submitting in Concur along with all other UConn business expenses for the related trip.
- Per Diem reimbursements for **UConn Guests** should be submitted via HuskyBuy.
- Per Diem reimbursements for **Students** should be submitted under their own profile in Concur.

Note: If an employee has incurred travel expenses on their Travel card on behalf of a UConn Guest or Student (except Grad Assistants, Grad Interns and Post-Docs) such as Airfare or hotel the employee should not include any Per Diem reimbursement for the Guest or Student on the expense report created to reconcile the travel card expenses in that employee's profile.

Meals – Per Diem vs Actuals - 2

Here is an **example below explaining** how the Per Diem allowance is calculated for each day:

In this scenario the traveler is taking a trip from Hartford, CT to a Conference in Dallas, TX from January 4th to January 8th.

1. On the first and last days of travel, January 4th and 8th, the eligible Per Diem allowance would be \$51.75 which is 75% of the full day Per Diem allowance of \$69.00. Therefore, the traveler can purchase meals on the travel card each of those days up to a total of \$51.75.
2. On January 5th, 6th and 7th the traveler can use their travel card to purchase meals up to but not exceeding the limit for each of those days which is \$69.00.
3. If on January 5th the traveler used their travel card to purchase meals totaling \$50.00, the traveler would not receive any credit back for that day even though the actual meal expenses totaled less than the daily allowance of \$69.00.
4. If on the following day, January 6th, the traveler used their travel card to purchase meals totaling \$79.00, the traveler would have exceeded the daily limit on that day and would be responsible for reimbursing the University for the \$10.00 overage.
5. The traveler can also choose to use the Per Diem method and purchase meals out of pocket then claim the reimbursement on their expense report for the total eligible amount according to the GSA and the UConn Travel policy.

Meals- APPLIES TO SFA Faculty, Staff, Students

SFA Travel Policy

POLICY

It is the responsibility of the traveler to consult and follow the applicable University and SFA travel policies. We recommend all travelers apply for a University Travel Card to reduce their out-of-pocket expenses.

Please be sure to always reference the most up to date University Travel Policy located at on the Travel Office's Website. In addition to adhering to the University Travel Policy and any applicable COVID guidance available at the time, travelers utilizing SFA funding must also follow the SFA per diem guidelines below based on the duration of their trip.

Travel lasting 14 days or longer in one location

- Lodging should be arranged in long-term style housing with a kitchen to help reduce both food and lodging costs.
- Lodging reimbursement will be capped at 75% of the location's daily GSA rate.
- Requires written preapproval, including a proposed budget for the trip. Please submit your request to your Department Head and Assistant Dean/COO prior to securing travel arrangements and include the SFA Travel Reimbursement Budget Worksheet to itemize your budget.
- Food reimbursement requests will be capped at either the daily receipted total or 75% of location's daily GSA rate.

Expected Expenses

If the Trip includes Air, Hotel and Car Rental expected to be paid for or reimbursed by the University the estimated expenses are required to be added to the Request.

1. Click the blue **Add** button under Expected Expenses.

Air Ticket

1. Click **Air Ticket**.

*Note(s): (1) A multiple destination trip will require multiple one-way air tickets. Select One Way, as needed.
(2) Contact UConn's TMC for assistance with complex travel, as needed.*

2. Begin typing a departure airport (full name or airport code) in the **From** field. *A live search activates, a list of options become available for selection.*
3. Click to select a valid option from the list.
4. Begin typing a destination airport (full name or airport code) in the **To** field.
5. Click to select a valid option from the list.
6. Complete the **Outbound Date**.

Expected Expenses – 2

6. Complete the **Outbound Date**.
7. Complete the **Return Date**.
8. Complete the **Estimated Amount** field.

Note: The Bradley Parking Pass program has been temporarily suspended by the State of Connecticut due to Covid19 related parking lot closures. While this suspension is in place you may use pay for parking at the lowest cost parking lot available and seek reimbursement upon return from the trip along with your other travel expenses.

9. Click **Save**.

Expected Expenses - 3

Car Rental

1. From the **Expected Expenses** menu, click the Add then click **Car Rental**. *The Car Rental fields display.*
2. Begin typing a city name in the **Pick-up Location** field. *A live search activates, a list of options become available for selection.*
3. Click to select a valid option from the list.
4. Type a city name in the **Drop-off Location** field.
5. Click to select a valid option from the list.
6. Complete the **Estimated Amount** field.
7. Click **Save**.

Expected Expenses - 4

Hotel Reservation

1. From the **Expected Expenses** menu, click **Hotel Reservation**.
2. The Check-in and Check-out dates will pre-fill from the Request header. Modify as needed.
3. Begin typing a city name in the **City** field. *A live search activates, a list of options become available for selection.*
4. Click to select a valid option from the list.
5. Complete the **Estimated Amount** field.
6. Click **Save**.

Expected Expenses - 5

Other Expenses

Additional travel related expenses can also be added in the **Expected Expenses** menu (e.g., mileage, meals, etc.).

1. Click Add in the **Expected Expenses** menu to get additional expense types.
2. Click the appropriate expense type from the list of expenses that appear or type the expense type in.
3. Complete required expense type fields.
4. Click **Save**.
5. Continue to add additional expenses, as applicable.

International Travel Information (Policies & Waiver)

1. Policy on Travel to Countries with a U.S. Department of State Travel Warning/Alerts

Policy establishes how, when and where Faculty and other travelers may travel abroad for university sponsored or university-related purposes. **Please visit [here](#) for full details.** Please note the addendum in the policy pertaining to the new tiered levels of Travel Advisories.

All travelers (traveling International) must complete an online Travel Waiver application to have travel approved by Global Affairs. All student travelers must also complete an online travel registration form with Global Affairs.

[Click here for the online travel waiver form.](#)

[To Countries of Concern](#)

All UConn faculty, other travelers or students planning international travel to a country sanctioned by the U.S. Government must clear their travel plans with the Export Control office (exportcontrol@uconn.edu) to ensure that any required approvals or licenses are in place prior to departure.

High Risk (Countries which have [OFAC](#) sanctions or embargoes in place)

[Sanctions Programs and Country Information](#)

Fly America Exception/Waiver

Fly America Act Guidance

UConn travelers are required by the "Fly America Act," to use Airlines owned by an American Company also known as "U.S. Flag Carriers" or on a foreign country's carrier that has a codeshare with a U.S. Flag Carrier regardless of cost or convenience (with a few exceptions) for all air travel and cargo transportation services funded by Federal Grants.

The checklist and waiver should be completed and attached to all Concur Requests and Reports where air travel is out of compliance.

Fly American Act Checklist & Waiver

Fly America Exception/Waiver																		
Uconn																		
Instructions: When a traveler uses a non-U.S. flag carrier on travel to be charged to federal sponsored awards, this form, along with documentation that supports the exception, may be completed and submitted with the request for reimbursement, when contacting and booking travel with Sanditz (the University's preferred vendor), this form is not necessary.																		
Regulation: Travelers are required by 49 U.S.C. 40118, commonly referred to as the "Fly America Act," to use United States air carrier service for all air travel and cargo transportation services funded by the United States Government unless it meets one or more of the exception criteria listed in the Federal Travel Regulation guidelines, FTR sections 301-10.135-138.																		
Note: Lower cost and personal convenience are not acceptable criteria for justifying the use of a non-U.S. Carrier.																		
Fly America Exception/Waiver Checklist (Supporting Documentation Required)																		
I. Travel to and from the United States (check all boxes that apply):																		
If a U.S. flag carrier offers nonstop or direct service (no aircraft change) from your origin to your destination, you must use a U.S. flag air carrier service unless it would: <ul style="list-style-type: none"> <input type="checkbox"/> Extend travel time, including delays at origin, by 24 hours or more; or <input type="checkbox"/> Qualifies for an EU Open Sky Exception: involves the use of a European Union (EU) carrier, travel to or connection through an EU Country and does not involve DOD funding. 																		
II. Travel between two points outside the United States (check all boxes that apply):																		
If a U.S. flag carrier does not offer nonstop or direct service (no aircraft change) from your origin to your destination, you must use a U.S. flag air carrier service on every portion of the route that it provides service, unless it would: <ul style="list-style-type: none"> <input type="checkbox"/> Increase the number of aircraft changes you must make enroute by 2 or more; or <input type="checkbox"/> Extend travel time by 6 hours or more; or <input type="checkbox"/> Require a connecting time of 4 hours or more at an overseas interchange point; or <input type="checkbox"/> Qualifies for an Open Sky Exception: involves the use of a European Union (EU) carrier, travel to or connection through an EU Country and does not involve DOD funding. 																		
III. Travel meets Fly America Exception Criteria (check all boxes that apply):																		
<ul style="list-style-type: none"> <input type="checkbox"/> A U.S. flag air Carrier service was not available for this itinerary at the time of booking <input type="checkbox"/> Use of a foreign air carrier is necessary for medical reasons (additional supporting documentation required) <input type="checkbox"/> Use of foreign air carrier is required to avoid unreasonable risk to traveler's safety. (see 41 CFR 301-10.138 (b)(2) for required supporting evidence). <input type="checkbox"/> Short distance travel: A U.S. flag carrier service is considered unavailable when the elapsed travel time on a scheduled flight from origin to destination by a foreign air carrier is 3 hours or less and the use of a U.S. flag air carrier doubles time enroute. 																		
IV. Air Travel meeting a Non EU Open Skies Exception:																		
<ul style="list-style-type: none"> <input type="checkbox"/> Air travel between the U.S. and either Australia, Switzerland, or Japan and meets all the following conditions: <ul style="list-style-type: none"> a. No city pair contract fare exists/available between the cities of origin and destination (must attach supporting documentation); and b. The traveler is using an air flag carrier of either Australia, Switzerland, or Japan; and c. Travel is not supported by a DOD funded award. 																		
Travel Information and Traveler/ FO Certification																		
Foreign Carrier: _____ Travel WebForm ID: _____ KFS Award No.: _____																		
Flight Origin: _____ Destination: _____ Dates of Travel: _____																		
I certify that I am compliant with the Fly America Act Regulation and attaching documentation that supports the Fly America exception checked above.																		
Name of Traveler (print name) _____ Approved by Traveler (signature) _____ Date _____																		
Name of Department/FO Approver (print name) _____ Approved by Department/FO Approver (signature) _____ Date _____																		
Contact Information																		
Assistance with Fly America Regulation/ Waiver																		
SPS Team Lead in Sponsored Program Services: • Telephone: (860)498-3619																		
• Katarra Davis - katarra.davis@uconn.edu																		
• Jen Przybyszewski - jenifer.prybyszewski@uconn.edu																		
• Meg Niewinski - meg.niewinski@uconn.edu																		
• Daniela Parciasepe - daniela.parciasepe@uconn.edu																		
Anthony Travel • Telephone: 1-800-325-2558 • email: UConnCampusTravel@santrav.com																		
University Travel Office • Telephone: 1-800-486-4137 ext 6 • email: travel@uconn.edu • website: http://travel.uconn.edu/																		

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the right side of the slide, with some extending towards the center. The overall aesthetic is clean and modern.

Shopping for Rates – Before the Travel Request

Shopping for Flight Options (Round Trip, One Way or Multi-City)

1. Select a flight option (e.g., Round Trip, One Way or Multi-City).
2. Type a departure city, airport name, or airport code in the **From** field. Live search results display.
3. Click to select the preferred departure airport.
4. Type an arrival city, airport name, or airport code in the **To** field. Live search result display.
5. Click to select the preferred arrival airport.
6. Click in the Departure and Return date fields and select appropriate dates from the calendar.



University Travel Policy requires travelers booking airfare combining personal and business travel to complete an airfare price comparison at the time of booking showing the reasonable cost of airfare for the portion of travel containing only business days. Travelers will only be reimbursed for their airfare when this comparison, submitted with their expense report, shows that the cost of their airfare with personal time, was less than or equal to the cost of the airfare comparison containing only business days. In the case that their airfare containing personal time is more than the business comparison travelers should not use a University travel card for the airfare and instead pay out of pocket with personal funds and seek reimbursement for the lower cost business comparison.

The screenshot shows a 'Trip Search' form with the following fields and options:

- Flight Type:** Round Trip (selected), One Way, Multi City.
- From:** BDL - Hartford Bradley Intl Airport - Hartford, CT
- To:** DCA - Washington D.C. Ronald Reagan National Airport - VA
- Depart:** 04/08/2024, 09:00 am, ± 3
- Return:** 04/12/2024, 03:00 pm, ± 3
- Pick-up/Drop-off car at airport
- Find a Hotel
- Search within:** 5 miles from
- Airport
- Address
- Company Location
- Reference Point / Zip Code
- Reference Point / Zip Code:** (e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')
- Only show results containing:**
- Search by:** Price

- Expense reports charged to grant accounts (SPS) will be routed for additional approval (e.g., athletics compliance officer, account PI, SPS control group, etc.)
- FO should approve and forward to traveler's supervisor if approved request significantly differs from details in submitted expense report.

Shopping for Flight Options (Round Trip, One Way or Multi-City) - 2

7. Use the remaining fields in this section to define the appropriate time range.
8. If a hotel will be necessary for this reservation, click **Find a Hotel** checkbox, and then complete additional applicable Hotel fields.
9. Click Search. Your Flight and Train search(s) results will display.

Shopping - Flight or Train Selecting

**Hartford, CT To Washington, DC
Fri, Apr 19 - Tue, Apr 23**

Hide matrix Print / Email Show as USD

	United	Delta	Southwest	Amtrak Regional	Multiple	Multiple	American Airlines
All 181 results	Preferred	Preferred	Preferred				
Nonstop 12 results	491.22 4 results	—	—	450.00 6 results	—	—	548.20 2 results
1 stop 167 results	500.72 28 results	536.11 12 results	792.78 5 results	417.00 22 results	481.25 5 results	529.21 31 results	556.20 64 results
2 stops 2 results	—	—	—	—	—	538.71 2 results	—

Shop by Fares Shop by Schedule

Search results may include Basic Economy fares. This type of fare may not allow cancellations, pre-assigned seat selection, or changes. Other restrictions may apply. Always read the fare rules for specific details before purchasing. Please contact Anthony Travel directly to proceed with booking Basic Economy fares.

Flight/Train Number Search: Sorted By: Price - Low to High Displaying: 98 out of 181 results. Previous | Page: 1 of 10 | Next | All

Amtrak Regional	06:09a → 11:44a	Direct	5h 35m	\$417.00	<input type="button" value="View Fares"/>
	04:02p → 09:57p	1 connection	5h 55m		

ROUND TRIP: NEW HAVEN STATE STREET STATION TO WASHINGTON - UNION STATION

- *Flights are sorted by the price – Low to High, by default. Each flight fare option includes both the departure and return flight per result.)*



Please be advised, American Airlines no longer allows name changes. If you are booking for a guest/non-employee of the university, if the trip is cancelled or changed the funds are not returned back to the university. The traveler retains the funds for future use.

1. Scroll through all flight and train search options to locate a desired flight or train.
2. Click to **View Fares**. (Fare options and other flight details will display)
3. Click informational icons for any allowable flight to see applicable details for each option.
4. Click an allowable flight **fare**. *The Review and Reserve Flight page displays.*

[Fly America Act Guidance](#)

UConn travelers are required by the "Fly America Act," to use Airlines owned by an American Company also known as "U.S. Flag Carriers" or on a foreign country's carrier that has a codeshare with a U.S. Flag Carrier regardless of cost or convenience (with a few exceptions) for all air travel and cargo transportation services funded by Federal Grants.

The checklist and waiver should be completed and attached to all Concur Requests and Reports where air travel is out of compliance.

[Fly America Act Checklist & Waiver](#)

Shopping, Reviewing and Reserve Flight Or Train

Trip Summary

Flight/Train Selected
Round Trip
BDL - DCA
Depart: Fri, 04/19/2024
Return: Tue, 04/23/2024

Finalize Trip

Review and Reserve Train

Trains

DEPART Fri, Apr 19 Hide details ^					
Fri, Apr 19	06:09a 11:44a	NEW HAVEN STATE STREET STATION WASHINGTON - UNION STATION	5h 35m	Amtrak Regional Train 141	↔

RETURN Tue, Apr 23 Hide details ^					
Tue, Apr 23	04:02p 09:40p	WASHINGTON - UNION STATION NEW HAVEN UNION STATION	5h 38m 15m	Amtrak Regional Train 178	↔
	09:55p 09:57p	NEW HAVEN UNION STATION NEW HAVEN STATE STREET STATION	02m	Amtrak Regional Train 478	↔

Enter Passenger Information

Ensure passenger information below is correct. @

Passenger [Edit](#) [Review all](#)

Name: Cynthia Lee Caron Phone: 8608880280 Email: qpb24001@uconn.edu

Rewards Program **Amtrak Guest Rewards Number**

Provide Ticket Delivery Preference
You can now experience better comfort in customizing your Amtrak booking experience. With our train options, you can decide where to spend or save money to make your trip optimal.
Ticket Delivery Method **Electronic (0.00)**

Review Price Summary

Description	Fare	Taxes and Fees	Charges
Train ticket	\$417.00	\$0.00	\$417.00
Total Estimated Cost: \$417.00		Total Due Now: \$417.00	

Select a method of payment
How would you like to pay?
There are no credit cards defined. [Add credit card](#)
* Indicates credit card is a company card

By completing this booking, you agree to the fare rules and restrictions.

[Back](#) [Reserve Train and Continue](#)

Make sure you complete this area if you want rewards!

1. Scroll through the Review and Reserve Flight or Train page to confirm accuracy.
2. Should you be booking for a Student or Guest enter the required Student/Guest's information as noted. (red asterisks)
 - Title
 - Legal First Name
 - Middle Name (on I41D) or check the No Middle name box
 - Legal Last Name
 - Gender
 - Date of Birth
 - Phone
 - Email

➤ Note: Optionally you may also enter the Known Traveler Number, DHS Redress No., and the Airline Frequent flyer rewards number.)

➤ Edit or Add information , if necessary.

Shopping, Reviewing and Reserve Flight Or Train - 2

Tip: Traveler information will auto populate from the traveler's profile, if available. See the Concur Navigation and Profile Setup documentation for details regarding Profile Setup.

3. Included in the reservation break down, baggage/fees are included. This may occur during the selecting process.
4. If **Travel Card** information has been previously saved to your Concur Profile, it will be listed under the **How Would you like to pay** drop menu.

Note: We recommend that you use your Travel Card as the form of payment for the Student/Guest.

5. Click **Reserve Flight or Train and Continue** to confirm.

Note: If you are not booking a car rental or hotel as well skip ahead to the Travel Details section of this document.

Shopping for Car Rental & Selecting

Trip Summary

- Car Selected
 - Pick-up: Fri, 04/19/2024
 - Drop-off: Tue, 04/23/2024
- Finalize Trip

Review and Reserve Car

Review Rental Car

Enterprise Car Rental Location Details

Type	Pick-up	Drop-off
Economy Car	Airport Terminal	Airport Terminal
Features	BWI: Baltimore 12:00 pm Fri, 04/19/2024	BWI: Baltimore 12:00 pm Tue, 04/23/2024

Provide Rental Car Preferences

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

Ex: Need early pick up (10am)

Make sure you provide Car Preferences

Enter Driver Information

Ensure the name below matches the I.D. you have with you on the day of pick-up. @

Driver

Name: Cynthia Lee Caron Phone: 8608880280 Email: opt624001@uconn.edu

Make sure you add in any Rental Programs.

Rental Car Agency Program Add a Program

No Program selected

Review Price Summary

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$48.38	Apr 19 - Apr 23	\$278.73*
Total Estimated Cost:			\$278.73
Total Due Now:			\$0.00**

* Rental provider's estimated amount. Exact fees unknown. Does not include additional fees incurred during time of travel.
** Remaining amount due at rental location.

[Back](#) [Reserve Car and Continue](#)

UConn's preferred car rental providers include Enterprise and National. If an alternate car rental company is used, you will need an Enterprise or National comparison from Anthony Travel.

Note: GUESTS and STUDENTS – For Enterprise/National car rentals employees can book a in Concur for guest and students but the employee will need to contact Anthony Travel in order to direct bill the charges to UConn (The UConn Travel card cannot be used for guest car rental charges). Please note these charges will show up in the UConn employee's Available expense queue in Concur, where they will need to submit a Concur Expense report. Alternately, the guest can pay for the car rental out of pocket and seek reimbursement through HuskyBuy

1. Review car rental search result options.
2. Scroll through the search results.
3. Click a **Total Cost** to make a **Most Preferred Car** Rental selection. He **Review and Reserve Car** screen displays.
4. Review Rental Car details for accuracy.

Note: Business travel car rental charges should be charged to your Travel Card. A comparison quote must be obtained from the TMC (Anthony Travel) if personal travel is combined with business travel. Personal car rental charge difference should be charged to your personal card.

5. Confirm the **Rental Car Preferences** and **Driver Information** details are complete and accurate. Edit as necessary.

Shopping for Car Rental & Selecting - 2

Trip Summary

Car Selected
Pick-up: Fri, 04/19/2024
Drop-off: Tue, 04/23/2024
Finalize Trip

Review and Reserve Car

Review Rental Car

Enterprise Car Rental Location Details

Type	Pick-up	Drop-off
Economy Car	Airport Terminal	Airport Terminal
Features	BWI: Baltimore 12:00 pm Fri, 04/19/2024	BWI: Baltimore 12:00 pm Tue, 04/23/2024

Provide Rental Car Preferences

Your preferences and comments will be passed to the rental car agency.

Comments (20 character max)
Ex: *Need early pick-up (10am)

Make sure you provide Car Preferences

Enter Driver Information

Ensure the name below matches the I.D. you have with you on the day of pick-up. @

Driver
Name: Cynthia Lee Caron Phone: 8008880280 Email: cqb2400@uconn.edu [Edit](#) | [Review all](#)

Rental Car Agency Program [Add a Program](#)
No Program selected

Make sure you add in any Rental Programs.

Review Price Summary

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$48.98	Apr 19 - Apr 23	\$278.73*
Total Estimated Cost: \$278.73			Total Due Now: \$0.00**

* Rental provider's estimated amount. Exact fees unknown. Does not include additional fees incurred during time of travel.
** Remaining amount due at rental location.

[Back](#) [Reserve Car and Continue](#)

- If booking for a Guest or Student enter the required **Driver Information** details noted by the **red asterisks**:
 - Title
 - Legal First Name
 - Legal Last Name
 - Phone
 - Email

Note: Optionally you can also enter the traveler's Rental Car Agency reward program number.

- Click **Reserve Car and Continue**. Search results for next segment display, as applicable.

- If you are not booking a hotel as well skip ahead to the Travel Details section of this document.

Note: For any car rental reservation, that falls within a class that is not compliant to the travel policy, a price comparison (dated at the time of booking) must be obtained. Price comparisons should be attached to the respective expense report with the car rental expense.

Shopping for Hotel & Selecting

The screenshot displays a hotel search interface. At the top, it shows the trip summary: "Check-in Fri, Apr 19 - Check-out Tue, Apr 23". Below this is a map of Washington, DC, with several hotel locations marked. To the left of the map is a sidebar with search filters: "Select a Hotel", "Finalize Trip", "Change Search", "Price", "Display Settings", "Property Brand", and "Amenities". The "Change Search" section shows the check-in and check-out dates, search radius, and location. The "Price" section shows a range from \$180 to \$935. The "Property Brand" section has checkboxes for various brands. The "Amenities" section has checkboxes for various amenities. Below the map, there is a "Lodging Per Diem limit for Washington - District Of Columbia: \$258.00" and a search bar. The main results area shows a list of hotels:

- 1. **Holiday Inn National Airport**
2650 Jefferson Davis Hwy, Arlington, VA 22202
@0.85 miles ★★★★★
Unable to retrieve rates for this hotel
Hotel details
- 2. **Crowne Plaza Washington National Airport**
1480 Crystal Dr, Arlington, VA 22202
@0.88 miles ★★★★★
Unable to retrieve rates for this hotel
Hotel details
- 3. **Hyatt House Washington DC / The Wharf**
725 Wharf Street SW, Washington, DC 20024
@2.05 miles ★★★★★ \$254
View Rooms
Hotel details
- 4. **Hyatt Place Washington DC/National Mall**
400 E Street SW, Washington, DC 20024
@2.4 miles ★★★★★
Get Rates
Hotel details

If a hotel was requested with your initial trip search, the hotel search results display next.

1. From the Hotel Per Diem Locations screen, confirm the Country, State, and Location fields have accurately prepopulated based on the hotel details.
2. Click **Next**. The business/personal travel prompt displays.
3. Read through the business/personal travel prompt and then click OK. The Hotel search results display.
4. Review the hotel search result options.
5. Click **View Rooms** for the desired hotel. Hotel rate details and room options display.
6. Click the desired **rate/room**.
7. If the hotel selected exceeds 150% of the allowable Hotel Per Diem, additional information will be required.

Note: If selecting a Hotel option that exceeds 150% of the allowable Hotel Per Diem for the location you are traveling to, additional information is required within Concur. Additionally, the traveler should obtain written approval from COO-Assistant Dean/Department Head.

Shopping for Hotel & Selecting - 2

Trip Summary

Hotel Selected

Nights: 4
Washington D.C. Ronald Reagan National Airport, Washington, DC
Check-in: Fri, 04/19/2024
Check-out: Tue, 04/23/2024

Finalize Trip

Review and Reserve Hotel

Review Hotel Room

Hyatt House Washington DC / The Wharf
AAA Discount Den 1 King - 1 King Bed Guestroom
4 Nights | 1 Guest*

Check-in	Check-out	Address	Phone
Friday, April 19, 2024	Tuesday, April 23, 2024	725 Wharf Street SW Washington, DC, District of Columbia 20024 United States	202-654-1234

* We reserve every hotel room for 1 guest only, regardless of the number of actual travelers sharing the room. The primary traveler's name is attached to the reservation for hotel check-in.

Provide Hotel Room Preferences

Your preferences and comments will be passed to the hotel.

Comments (250 character max)

 Request linen pillow.

Enter Hotel Guest Information

Ensure the name below matches the I.D. shown on the day of check-in.

Hotel Guest [Edit](#) | [Review all](#)

Name: Cynthia Leo Caron Phone: 8008880280 Email: cgc34005@uconn.edu

Hotel Program [Add a Program](#)

Review Price Summary

Description	Nightly rate	Dates	Total
Hyatt House Washington DC / The Wharf	\$249.90	Apr 19 - Apr 20	\$249.90
	\$235.45	Apr 20 - Apr 21	\$235.45
	\$238.00	Apr 21 - Apr 22	\$238.00
	\$254.15	Apr 22 - Apr 23	\$254.15
Total Estimated Cost: \$977.50*			Total Due Now: \$0.00**

* May not include taxes or additional fees.
** Remaining amount due at hotel location.

Select a method of payment

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.
There are no credit cards defined. [Add credit card](#)

* Indicates credit card is a company card

Accept Rate Details and Cancellation Policy

Please review the rate details and cancellation policy provided by the hotel.

Hyatt House Washington DC / The Wharf H.X.A.L.T.

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:
RATE: USD 254.15
TOTAL RATE: 1132.41 USD
RATE CHANGES OVER DURATION OF STAY

I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

The Review and Reserve Hotel screen displays.

8. Review details for accuracy.
9. Confirm the **Hotel Room Preferences**.

[SFA Travel Policy](#)

Note: For Guest and Student hotel bookings at local hotels with UConn Travel Rate Agreements enter in the Comments field under the Hotel Preferences: “UConn Guest – Charge Room rate only” or specify exactly what hotel expenses should be charged to the employee’s travel card e.g. Parking, etc.

10. If booking for a Guest or Student enter Hotel Guest Information required as noted by the red asterisks:

- a. Title
- b. Legal First Name
- c. Legal Last Name
- d. Phone
- e. Email

Note: Optionally you can also enter the traveler’s Hotel’s reward program number.

Shopping for Hotel & Selecting - 3

Note: Optionally you can also enter the traveler's Hotel's reward program number.

11. If your **Travel Card** information has been previously saved to your Concur Profile, it will be listed under the **How would you like to pay** drop down menu.

Note: GUESTS and STUDENTS - The University has negotiated rate agreements with several local hotels. Employees can book these local hotels in Concur and utilize their University Travel Card to pay for the guest or student local hotel stay without having to complete a 3rd Party Credit Card Authorization. For a list of local hotels please see [UConn Travel Rate Agreements](#). For hotels without a UConn negotiated rate agreement, employees can use their travel card to book in Concur for the guest or student but would need to work with Anthony Travel to secure a 3rd Party Credit Card Authorization form. In both instances advise the Guest or Student they will need to provide a personal credit card at check-in for incidentals (non-reimbursable expense such as movie rentals, etc.). Alternately, the guest can also choose to pay out of pocket and provide their own form of payment to cover the duration of their stay, upon check-in then seek reimbursement through HuskyBuy after the trip has ended.

12. If the Guest would like to use their own credit card to secure the booking, select the option to **Use a temporary card** and enter the **credit card type, credit card number and expiration date**.
13. Review the **Rate Details and Cancellation Policy** information.
14. Check the **I agree to the hotel's rate rules, restrictions, and cancellation policy box**.
15. Click **Reserve Hotel and Continue**.

Delegates



Concur | Adding A Delegate

Overview

A Delegate is an individual designated in Concur to assist with tasks such as: creating and submitting Travel Requests, creating Expense and Company Billed Statement Reports, approving Travel Requests and approving Expense and Company Billed Statement Reports on behalf of another Concur user.

Note: To allow another user to book Travel on your behalf, within Concur, the traveler must identify the user as a Travel Assistant.

There are three (3) types of delegates:

1. **A Preparer Delegate** - can prepare/submit requests and prepare expense reports on behalf of a user.

Note: (1) Preparer delegates cannot submit requests containing cash advances. (2) Preparer delegates will notify the traveler when an expense or Company Billed Statement report is ready for review and submission, however they will NOT be able to submit the expense or Company Billed Statement report on behalf of a traveler.

2. **An Approver Delegate** - can approve Requests or Reports on behalf of a user. (To be an Approver Delegate, you must already have the approver role.

Note: An Approver Delegate can be assigned on a temporary or permanent basis.

3. **A Previewer Delegate** - can review submitted Requests and Reports on behalf of an Approver, however they will not be able to approve these Requests or Reports.

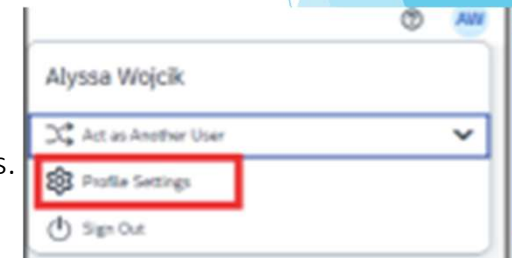
Concur | Adding A Delegate - 2

How To Add A Delegate

The Travel Request, Expense (including Company Billed Statement Report) Report modules within Concur share delegates. Therefore, by assigning permission(s) to a delegate, you are assigning permissions for another user to access and assist with your Concur Profile, Travel Requests, Expense and Company Billed Statement Reports.

Below is a list of the steps you will take in your Concur profile to add a preparer or approver delegate.

1. Navigate to any web browser.
2. Access Concur by logging in through our website at travel.uconn.edu and clicking “**Login to Concur Travel & Expense.**”
3. From the Concur homepage, click **Profile** and then click **Profile Settings**.
4. On the left of your screen select Request Delegates from the Request Settings.
5. Click **Add** and then type in your search information.



Tip: You can search by employee name, email address, employee ID or login ID.

6. Once the name you are searching for appears, verify all the information is correct. A filtered dropdown list of matching names displays.

Concur | Adding A Delegate - 3

- Click on the desired name in the dropdown.
- Click the check boxes to assign the permission you would like to give to each delegate.
- Click **Save**. Once you click save, the next time your delegate(s) log into Concur, they will be able to act as your delegate and perform the tasks you have granted them permission for.

Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

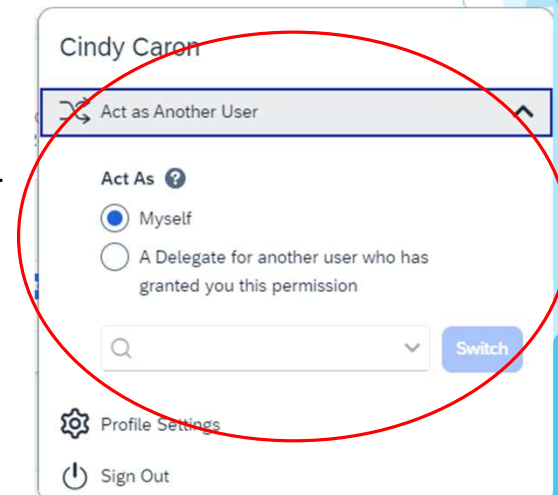
Note: Concur Delegates - Due to internal controls/separation of duties, the staff in the SFA Financial Services Office **cannot be your delegate** in Concur.

Delegate Permission	Permission Description
Can Prepare	This option allows a delegate to prepare Reports on your behalf. NOTE: Expense and Company Billed Statement reports cannot be submitted by a delegate, unless the traveler is no longer a UConn employee.
Can Submit Reports	This option is recommended. This option allows a delegate to trigger any audit rules that may need to be resolved before the Traveler submits the Expense or Company Billed Statement Report. NOTE: A Delegate must notify a traveler when a report is ready to be submitted by emailing the traveler outside the system.
Can Submit Requests	This option allows a delegate to create and submit Travel Requests on your behalf. NOTE: Delegates can submit requests on a user's behalf if the request does not contain a Cash Advance.
Can View Receipts	This option is recommended for all delegates and will automatically be marked with a check when selecting the Can Prepare permission for a delegate. This allows a delegate to view your receipt store, e-receipts, receipts images, etc.
Receives Emails	This option will copy a delegate on all emails generated by Concur addressed to you (the traveler).
Can Approve	If available, this option allows a delegate to approve requests on your behalf permanently.
Can Approve Temporary	If available, this option allows a delegate to approve requests or expenses temporarily – based on a timeframe you indicate (usually assigned when the approver will be out of office with no access to approve in Concur themselves).
Can Preview for Approver	This option allows a delegate to review all Requests, and Reports submitted to you (the approver).
Receives Approval Emails	This option will copy a delegate on all approval emails generated by Concur addressed to you (the approver).

Concur | Working As A Delegate

Logging In As A Delegate

1. Navigate to any web browser.
2. Access Concur by logging in through our website at travel.uconn.edu and clicking “Login to Concur Travel & Expense.”
3. Once you have been granted permission to act on behalf of another user, from the Concur homepage click your initial icon in the upper right-hand corner.
4. Click in the **Act as Another User** field.
5. Type the travelers name in the field and a list of names displays.



Concur | Working As A Delegate - 2

Logging In As a Delegate

6. Select the name of the person you would like to 'act as' from the list.

Notes:

- (1) If you do not see the name, you are looking for, type the first few letters of the individual's name to search for them in the drop-down.
- (2) If an individual does not appear in your drop-down, it is usually because that person has not yet assigned you as a delegate.
- (3) If you are a delegate for more than 10 people, you should contact the travel team for additional Assistance to have them, added.

7. Click Switch.

The delegates view will change to display an "Acting as" badge (top right corner) followed by the traveler's name, highlighted in green.

The screenshot displays the Concur user interface for a user named Cindy Caron. The interface includes a header with the UCONN logo and navigation options like 'Start a Report', 'Enter Reservation', 'View Trips', and 'Available Expenses'. A dropdown menu is open, showing the 'Act As' section with two options: 'Myself' and 'A Delegate for another user who has granted you this permission'. The second option is selected, and a search dropdown below it shows 'DelMastro, Dylan C' with a 'Switch' button. A red circle highlights the 'Act As' section and the search dropdown. The main content area includes sections for 'Trip Search', 'Alerts', 'Company Notes', and 'My Tasks'.

Concur | Working As A Delegate - 3

Functions of a Delegate

As a delegate, you will be able to perform functions that the user has assigned to you such as:

- View/Modify Concur Profile
- Prepare and submit Travel Requests
- Prepare Expense Reports
- Preview Travel Requests or Expense Reports submitted to the user for approval
- Temporary or permanent assignment of Travel Request and Expense Report approval

The screenshot displays the Concur user interface for a delegate. At the top right, a green button labeled "Acting as DellMastro, Dylan C" is circled in red. Below this, the UCONN logo is visible. A navigation bar contains buttons for "Start a Request", "Start a Report", "02 Authorization Requests", "00 Available Expenses", and "01 Open Reports". The "Company Notes" section includes a "Worldwide Caution" message with bullet points: "Stay alert in locations frequented by tourists.", "Enroll in the Smart Traveler Enrollment Program (STEP) to receive information and alerts and make it easier to locate you in an emergency overseas.", and "Follow the Department of State on Facebook and Twitter". The "Tasks" section shows three task cards: "02 Open Requests" with two items (05/01 test Travel and 04/26 test \$602.50 — Travel), "00 Available Expenses" with a message "User currently has no available expenses." and a checkmark icon, and "01 Open Reports" with one item (04/24 Pro-Card Report 04/24 - 05/23 1690 \$110.48).

Concur | Working As A Delegate - 4

Notifying User To Submit Expense Reports

Although preparer delegates can create and modify Expense Reports on behalf of another user, they are NOT able to submit the Expense Reports for approval. An expense report must be submitted for approval by the traveler whom incurred the expense(s).

Note: The preparer delegate can click submit (within the traveler's expense report) to resolve any exception messages however the report does not route for approval. Once applicable exceptions are resolved by the delegate, the delegate should email the traveler to advise that the expense report is ready for submission.

After preparing an expense report the delegate must take the following steps to notify the traveler when the report is ready for reviewed and submission:

1. At the top right of the page click **Submit**.
2. After you click **Submit** while acting as a delegate:
 - *The delegate will need to send an email to the user/traveler, notifying them that there is an expense report waiting for their review and submittal.*
3. After clicking **Submit**, the delegate may still make changes before the user/traveler submits it.

Concur | Working As A Delegate - 5

Note: This is the same process for previewer delegates. They can view the Travel Requests and Expense Reports however they will need to notify the approver outside of Concur via email or phone to login and do the actual approval.

Signing Out Of Delegate's Account

After the delegate has completed all the tasks on behalf of the user, the delegate can return to their own account using the following steps:

1. Click the green Acting As button at the top right of the page.
2. Click the bubble next to Myself to act as yourself again.

Group Travel

The background features abstract geometric shapes in various shades of blue, including light sky blue, medium cerulean, and dark navy blue. These shapes are layered and overlapping, creating a modern, dynamic feel. The shapes are primarily located on the right side of the page, with some extending towards the center.

Group Bookings



Overview

Group travel is considered ten (10) or more people traveling together on the same itinerary. Anthony Travel can provide reservations for flights (both domestic and International), hotel, lodging, ground transportation, tours, and other related travel services for all group bookings.

Pre-Approval Request

Travel including airfare, car rental and hotel must be fully approved prior to the start date of the trip. For Group travel this preapproval would be submitted via a Concur Request. Instructions on how to submit a Travel request in Concur can be found at <https://travel.uconn.edu/training-and-resources/>.

When submitting the request in Concur consider the items below:

1. The employee (or assigned preparer delegate) covering the group booking expenses with their travel card must submit the request in the card holder's profile.
2. Enter the estimated expenses for the total airfare, Car rental or hotel on the segments tab of the request and submit for approval.

Group Bookings - 2

Booking Process

Follow the instructions below for booking group travel on the same itinerary.

1. The group organizer in the UConn department will contact Anthony Travel's dedicated agent(See below for contact information).
2. The group organizer in the UConn department will work with the Anthony Travel agent to obtain preliminary itinerary and rates.

Note: As early as eleven (11) months prior to travel, an itinerary and rates can be quoted.

3. Once a decision is made on the itinerary and the rates are confirmed, Anthony Travel will provide a Group Travel Contract/Agreement which includes the deadlines, pricing, and airline and/or hotel terms and penalties to the requesting UConn department and UBS, Business Services Category Manager or designee for review.

Note: UBS will confirm with the requesting UConn department that the information on the itinerary is correct.

4. Once the information is confirmed, the appropriate level of signature within UBS will be obtained.
5. The final, signed contract/agreement will be provided to Anthony Travel and the UConn group organizer.
6. Payment should be made using the group organizer's Travel Card.

The background features abstract geometric shapes in various shades of blue, including light blue, medium blue, and dark blue, arranged in a modern, layered composition. The shapes are primarily triangles and polygons, some overlapping, creating a sense of depth and movement. The overall aesthetic is clean and professional.

Guest – Pre-Approvals & Payments

Guest Pre-Approvals & Payments

Payment of Travel Segments

Airfare

Employees can utilize their University Travel Card to pay for the guest's airfare.

Hotels

University has negotiated rate agreements with several local hotels.

- Employees can book these local hotels in Concur and utilize their University Travel Card to pay for the guest's local hotel stay without having to complete a 3rd Party Credit Card Authorization. For a list of local hotels please see [UConn Travel Rate Agreements](#).

Hotels without a negotiated rate agreement – Employees can book in Concur for the guest and have the option of UConn paying or the guest paying.

- If UConn is paying, please work with Anthony Travel to make the booking and secure a 3rd Party Credit Card Authorization, where the UConn Employee will use their Travel card.
- If the guest is paying, they will seek reimbursement through HuskyBuy.

Guest Pre-Approvals & Payments - 2

Car Rental

Employees can book in Concur for the guest and have the option of UConn paying or the guest paying.

- If UConn is paying, please work with Anthony Travel to make the National/Enterprise booking in order to direct bill the charges to UConn (You will not be able to use the UConn Travel card for guest car rental charges). Please note these charges will show up in the UConn employee's Available expense queue in Concur, where they will need to submit a Concur Expense report.
- If the guest is paying, they will seek reimbursement through HuskyBuy.

Employees are responsible for getting a copy of the receipt from the guest for any airfare, car rental or hotel charges expected to be paid or reimbursed by UConn.

If there are any questions, please contact Travel Services at travel@uconn.edu.

Guest Pre-Approvals & Payments – 3

Pre-approval of Guest Travel Segments

The University requires pre-approval for travel that involves any travel segment (Airfare, Hotel or Car Rental) for employees, students and guests. For employees and students, the request is initiated and approved in the Concur Request module. For guests that have pre-approval through other means (example - contract, purchase order, departmental program, event, conference, etc.) they will not require a pre-approval to be initiated or approved in the Concur Request module. In these cases, the University Employee will attest to the fact in Concur or HuskyBuy that this pre-approval is held in the department and can produce this pre-approval if requested. Departments can also utilize Concur's Travel Request for guest travel where there is no clear documentation as to the travel approval for the guest.

Guest Travel – Not Afflicted with UConn (Search Candidate)

Requests are not required in Concur for guests, but approval must be obtained in one of two ways. Either the approval is held within the department, or there is a request in Concur. When filling out the expense report for the guest, there will be a drop down on the report header to say how approval was obtained. Email from the department head serves as an appropriate approval, just need to attach that to the expense report.

If there are any questions, please contact Travel Services at travel@uconn.edu.

If this trip is for international travel and you would like to request International insurance through our CISI coverage for the guest, please complete the [UConn CISI Request for Guests/Certain Students/Group Bookings](#) Form and email it to travel@uconn.edu for processing.

The Travel Request

The background of the slide is white with abstract blue geometric shapes. On the right side, there is a large, complex shape composed of several overlapping triangles and polygons in various shades of blue, ranging from light sky blue to dark navy blue. A thin, light blue line extends from the bottom left towards the right, passing through the lower part of the blue shapes. On the far left edge, a small portion of a light blue triangle is visible.

Concur Request

Helpful Tips/Tricks:

- Ballpark estimate for flights with firm arrival dates/departure dates (times would be nice)
- Ballpark estimate for hotels. If there is a "conference rate" for a hotel that Concur will not find, it is OK to book through the conference site, just note this in comments on the requests
- Car rental (if any)
- Estimated taxi/uber/lyft costs (question for you or travel or FSO/SFA: does uber/taxi/lyft count as "car rental" or is it separate?)
- If they have the conference registration fee and they have a ballpark for food, it can't hurt to add it (this is where an FSO/SFA question comes in. I wonder if this is something we require now (I don't think it is) and if not, should we?)

The Request module will be used by UConn travelers to seek Travel* pre-approval. Formal Concur pre-approvals will provide an avenue for employees to request travel in an easy-to-use system and allow the fiscal officers the ability to approve the budget for the trip.

Trip Detail/Segment	Request
Airfare	Required
Hotel	Required
Car Rental	Required
Personal Car Mileage	Recommended
Business Meal	Not Required
Conference Registration Fee	Not Required

* Travel is defined as any trip with airfare, hotel, and car rental. Regardless of trip details, approval should be obtained from the traveler's supervisor prior to booking travel.

Start a New Travel Request

1. From the Concur homepage, navigate to the top of the page and click **Start a Request**.

The screenshot displays the SAP Concur homepage. At the top left, there is a 'SAP Concur' logo and a 'Home' dropdown menu. The main header area features the 'UCONN UNIVERSITY OF CONNECTICUT' logo on the left and a navigation bar on the right. The navigation bar includes a red circle around the '+ Start a Request' button, followed by '+ Start a Report', '+ Enter Reservation', '00 Authorization Requests', '00 Available Expenses', and '00 Open Reports'. Below the navigation bar, the page is divided into several sections: 'Trip Search' with options for 'Booking for myself' and 'Book for a guest', a 'Mixed Flight/Train Search' form with fields for 'From', 'To', and 'Search', and 'My Trips (0)'. On the right side, there are 'Alerts' with two notifications, 'Company Notes' with a 'Worldwide Caution' section, and 'My Tasks' with three cards: '00 Open Requests', '00 Available Expenses', and '00 Open Reports'. The 'Start a Request' button is highlighted with a red circle.

- All UConn business travel that includes Airfare, Car Rental or Hotel (domestic and international) requires submission of a Travel Request in Concur, prior to the start of travel.
- Note: Fields identified with a red bar are required. Complete all required field.

Request Headers/Create New Report

Create New Report ✕

* Required field

1 Policy *
UCONN General Travel & Expense

2

3 Business Travel Start Date *
MM/DD/YYYY

4 Business Travel End Date *
MM/DD/YYYY

5 Trip Purpose *
None Selected

6 Trip Name *

7 Professional Development/Travel Award No ?

8 Traveler Type *
None Selected

9 Trip Type * ?
None Selected

10 Does this trip include personal travel? ?
None Selected

11 Personal Travel Dates ?

12 Business Purpose/Justification * ?
0/500

13 Account Number *
3

*Sub-Account Number
4

14 Additional Information/Comment
0/500

Cancel Create Report

Request Headers/Create New Report - 2

1. Request Policy	This field will default as appropriate.
2. Trip Name	<p>Enter a brief and accurate description of the nature of the business trip.</p> <p>Does trip include a Level 3 or 4 Country/Region? Level 3 or 4 Country/Region field is required. Refer to the Company Notes section in Concur for additional assistance with the Level 3 or 4 Country/Region dropdown.</p> <p><i>Note: Many fields have a Quick Help Guide, identified by a question mark in a gray circle. Hover over any Quick Help Guide for helpful information as you complete each field.</i></p>
3. Business Travel Start Date	Enter the first day of your travel.
4. Business Travel End Date	Enter the last day of your travel.
5. Trip Purpose	<p>Make a selection from the dropdown, as appropriate.</p> <p><i>Tip: A conference Travel Request requires an attachment of a conference brochure, or the information noted in the Business Justification field of conference name, topic, date and location.</i></p>
6. Professional Development Travel Award #	If your expenses are partially or fully funded by AAUP or UCPEA, enter the Faculty Travel Funding Request # or Professional Development Fund Award Request #, respectively.

Request Headers/Create New Report - 3

7. Traveler Type	<p>This field defaults from your profile.</p> <p><i>Note: If this is a Travel Request for a Guest or Student you will select appropriate traveler type from the drop-down menu.</i></p>
8.. Trip Type	<p>Make a selection from the dropdown, as appropriate.</p> <p><i>Note: When traveling to more than one business location, use the furthest trip type option (ex: Washington/Canada travel - Intl). If traveling outside of the US, select International.</i></p>
9. Does this trip include personal travel?	<p>Choose yes if you are including additional time outside of business travel. If yes a business comparison for flights must be attached. Comparison needs to be done at time of booking NOT when trip is completed.</p> <p><i>? If you are including additional time outside of business travel, select yes. If yes, a business comparison for flights must be attached when submitting the expense report. Comparisons need to be done at the time of booking not when the trip is completed.</i></p>
10. Personal Travel Dates?	<p>Complete this field, if personal travel = Yes.</p> <p><i>Note: At time of booking, the traveler should obtain a cost comparison in Concur. Cost comparisons must be attached to the Expense Report at the time of submission. Business Purpose/Justification. Enter a brief description stating the business purpose of travel.</i></p>

Request Headers/Create New Report - 4

11. Business Purpose/Justification?	Please enter a detailed description stating the business purpose of travel and how this benefits the University of Connecticut
12. Account #	This field should pre-populate to your default/home department account - based on profile settings. If the account does not auto populate, type your KFS number in the Account Number field. Then select the account from the menu options that display.
13. Sub Account #	If the KFS account you are using has an associated sub-account number, type your sub-account number in the Sub-Account Number field, then select the account from the menu options that display.
14. Create Report	Click on create report.

Concur | Single Day Travel Allowance

Overview

Single day travel allowances apply for per diem when you have incurred meals during a business trip that is at least 10 consecutive business hours but does not involve an overnight stay.

A traveler's meal per diem amount(s) – for a Single Day Travel Allowance - will equal 75% of the allowable GSA rate, based on the End Location.

Single Day individual meals (meal per diem or directly reimbursed) are taxable. This excludes business meals. Please note the taxable amounts will be reported to Payroll to be included in your earnings. This document provides an overview for expensing meals using a single day itinerary in Concur.

Single Day Travel Allowances

1. From within an Expense Report, complete the required **Report Header** fields then scroll to the bottom of the Report Header. **The Claim Travel Allowance** menu displays.
2. Click **Yes**, since meal (Per diem) expenses will be included with the expense report. **The Travel Allowances** window will display, skip ahead to the **Travel Allowances Itineraries** section of this training document.
3. Click **Next**.



The screenshot displays the 'Travel Allowances For Report: Test' interface. It features two main sections: 'Assigned Itineraries' and 'Available Itineraries'. Both sections have a table with columns for 'Departure City', 'Date and Time', 'Arrival City', 'Date and Time', and 'Arrival Rate Location'. The 'Assigned Itineraries' section shows 'No Assigned Itineraries Found'. The 'Available Itineraries' section shows 'No Available Itineraries Found'. At the bottom right, there are buttons for 'Previous' and 'Next'.

Concur | Single Day Travel Allowance - 2

- Click Create New Itinerary.
- Click Go to Single Day Itineraries.
- Modify the date displaying in the **Choose start date** field and then click **Go**. For the **date(s)** you are claiming a Travel Allowance (Meals Per Diem), complete the following fields:
 - **Start Location:** Enter your starting location for that day and click Tab.
 - **Depart (time):** Enter the time you left and click Tab.
 - **End Location:** Enter your last business destination of the day and click Tab.
 - **Arrive (time):** Enter the time you arrived at your final business location and click Tab.
 - **Depart (time):** Enter the time you left the “End Location” and then click Tab.
 - **Back at Origin (time):** Enter the time you arrived home and click Tab.
 - **Hours:** If the length of your travel is 10 hours or more, 75% of the allowable GSA Per Diem rate displays
- Click **Save**.

Travel Allowances For Report: Test

Single Day Itineraries Available Itineraries Expenses & Adjustments

Choose start date: 04/29/2024 Go

Exclude	Date	Start Location	Depart	End Location	Arrive	Depart	Back At Origin	Hours
<input type="checkbox"/>	04/29/2024 Monday							
<input type="checkbox"/>	04/30/2024 Tuesday							
<input type="checkbox"/>	05/01/2024 Wednesday							
<input type="checkbox"/>	05/02/2024 Thursday							
<input type="checkbox"/>	05/03/2024 Friday							
<input type="checkbox"/>	05/04/2024 Saturday							
<input type="checkbox"/>	05/05/2024 Sunday							

Save Itinerary

Go to Standard Itinerary Next >> Cancel

Travel Details

1. From the **Travel Details** screen.
2. Scroll through each segment to review the trip details, including the total estimated cost of the trip.
3. Make any necessary changes.
4. Click **Next**. The **Trip Booking Information** screen displays.
5. Review the **Trip Name**. Edit as desired.
6. If booking for a Student or Guest, the email address entered earlier in the booking process will automatically populate in the field **Send a copy of the confirmation to:**
7. Make the appropriate selection from the **Airfare charged to a Federal grant?** dropdown.

Note: There is no option to hold a trip before booking. Airfare is not ticketed upon booking, rather a UConn travel agent will send a follow-up email with a ticket number once a seat is confirmed on a flight.

Travel Details - 2

8. Click Next. The Trip Confirmation page displays with details.
9. To complete booking, scroll down to click Confirm Booking. Trip details are sent to an agent for ticketing.
10. Click Finish.

Note: To ensure the booking is completed, we suggest that you keep clicking next until there are no further next options and the final confirmation page of the booking appears that says your trip is confirmed.

Tip: Shortly after travel is booked, Concur will send an email to the traveler (and their delegate(s), if applicable) confirming travel details. Within hours, Anthony Travel will send a separate email confirming ticketing number, and respective flight information, if a flight was booked.

Request Details

1. Click the **Request Details** drop-down menu to review the available options.
2. **Edit Request Header.** Select this option to return to the Request Header to make changes to the information that was completed in the previous steps.
3. **Request Timeline.** Select this option to review the Approval workflow of the Request after successfully submitting the request.
4. **Audit Trail.** Select this option to review the history of the Request after successfully submitting the request.
5. **Add Cash Advance.** Select this option on a need only basis after adding estimated trip expenses.

Note: (1) Travel cash advances will be limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly on a University Travel Card or by the University (such as air tickets, conference registration fees, meals, hotel, or rental car). Travel advances may only be Requested for \$500 or greater and will not be issued more than 10 days prior to the departure date. (2) Guests are not eligible for a Cash Advance .

Submitting A Request

1. Once expenses are added to the Request, click **Submit Request**. *An attestation displays.*

The screenshot shows a web interface for submitting a request. At the top, it displays 'Test \$951.50' and 'Not Submitted | Request ID: 73VX'. There are two buttons: 'Copy Request' and 'Submit Request', with the latter highlighted by a red box. Below this is a section titled 'EXPECTED EXPENSES' with sub-buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A table lists the following expenses:

<input type="checkbox"/>	Expense type↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Car Rental	Baltimore, Maryland - Baltimore, Maryland	05/06/2024	\$230.00	\$230.00
<input type="checkbox"/>	Air Ticket	Hartford (BDL) - Baltimore (BWI) : Round Trip	05/06/2024	\$300.00	\$300.00
<input type="checkbox"/>	Hotel Reservation	Baltimore, Maryland	05/06/2024	\$180.00	\$180.00
<input type="checkbox"/>	Meal Per Diem Single Location	Baltimore Washington Intl (Airport - BWI), Baltimore, Maryland	05/06/2024	\$241.50	\$241.50 Allocated
					\$951.50

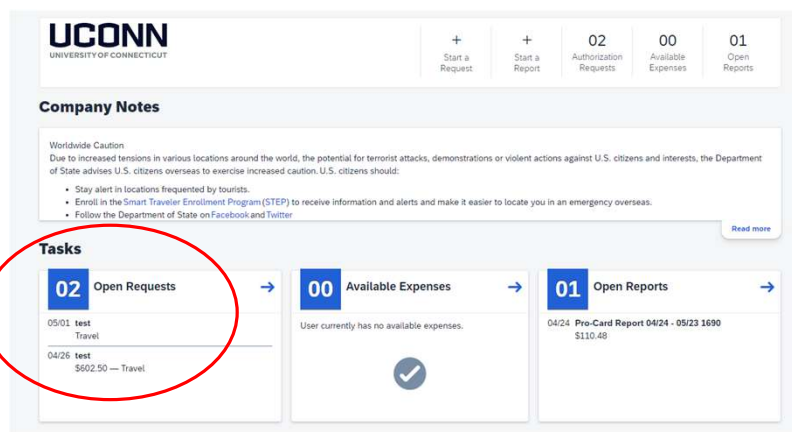
2. Scroll to read through the attestation, and then click **Accept & Submit**.
3. Requests will route for approval to the direct supervisor of the employee and fiscal officer of KFS account. Additional approvals may apply (e.g., Export Controls or Global Affairs, etc.).

Note: (1) If a request is not yet fully approved you can open the request and 'Recall' the request to make changes. (2) If an approved Request is cancelled or closed inadvertently, a new Travel Request must be created, and submitted for approval.

Copying A Previous Request

If you travel to the same destination more than once, there is a copy feature that will copy the Request and you will need to make changes details, as necessary.

1. From the Concur homepage, click **Requests** from the **Home** dropdown in the upper left-hand corner. *Your list of Requests display.*



The screenshot displays the UConn Concur homepage. At the top, there are navigation buttons: '+ Start a Request', '+ Start a Report', '02 Authorization Requests', '00 Available Expenses', and '01 Open Reports'. Below this is a 'Company Notes' section with a 'Worldwide Caution' message. The 'Tasks' section is highlighted with a red circle around the '02 Open Requests' task. This task lists two items: '05/01 test Travel' and '04/26 test \$602.50 — Travel'. To the right of the '02 Open Requests' task is the '00 Available Expenses' task, which shows 'User currently has no available expenses.' and a checkmark. Further right is the '01 Open Reports' task, which shows '04/24 Pro-Card Report 04/24 - 05/23 1690 \$110.48'.

2. Click the checkbox, to the left, of the Request you want to copy. The Copy feature activates to the right.
3. Click **Copy Request**. (from the top right). *The Copy Request dialog displays.*

Copying A Previous Request - 2

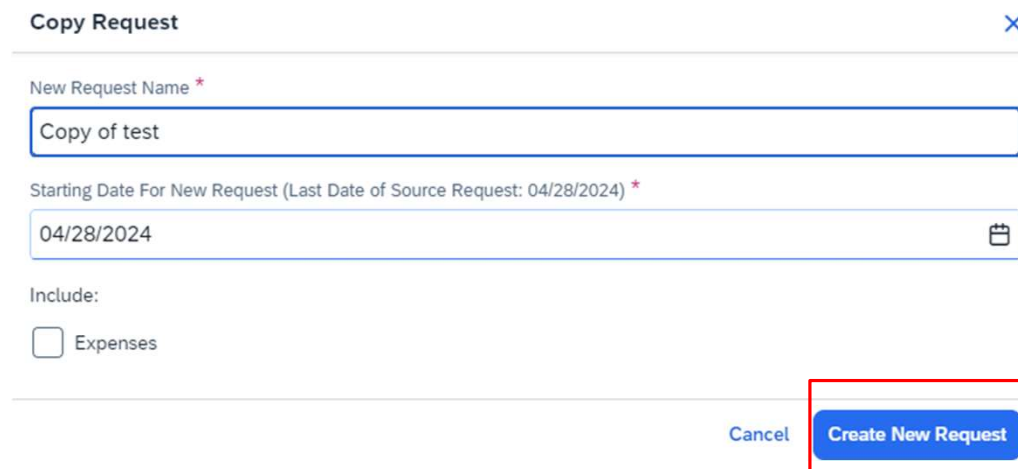
The screenshot shows a web interface for managing a request. At the top left, it displays 'test \$602.50' with a trash icon. Below this, it says 'Not Submitted | Request ID: 6YYD'. There are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. On the right side, there are two buttons: 'Copy Request' (highlighted with a red box) and 'Submit Request'. Below the header is a section titled 'EXPECTED EXPENSES' with sub-buttons 'Add', 'Edit', 'Delete', and 'Allocate'. A table lists three expense items:

<input type="checkbox"/>	Alerts↑↓	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>		Hotel Reservation	Baltimore, Maryland	04/26/2024	\$250.00	\$250.00
<input type="checkbox"/>		Air Ticket	Hartford (BDL) - Baltimore (BWI) : Round Trip	04/26/2024	\$180.00	\$180.00
<input type="checkbox"/>		Meal Per Diem Single Location	Baltimore, Maryland	04/26/2024	\$172.50	\$172.50

4. Modify the name of the Request to reflect the new travel.
5. Update any other options, as necessary and then click **Create New Request**. *A new Request displays with the header tab active.*
6. Review the Request Header and Expected Expenses for accuracy.
7. Attach documentation, as needed and then Submit the Request, as usual.

Copying A Previous Request – 3

8. Modify the name of the Request to reflect the new travel.
9. Update any other options, as necessary and then click **Create New Request**. *A new Request displays with the header tab active.*



Copy Request ×

New Request Name *

Copy of test

Starting Date For New Request (Last Date of Source Request: 04/28/2024) *

04/28/2024

Include:

Expenses

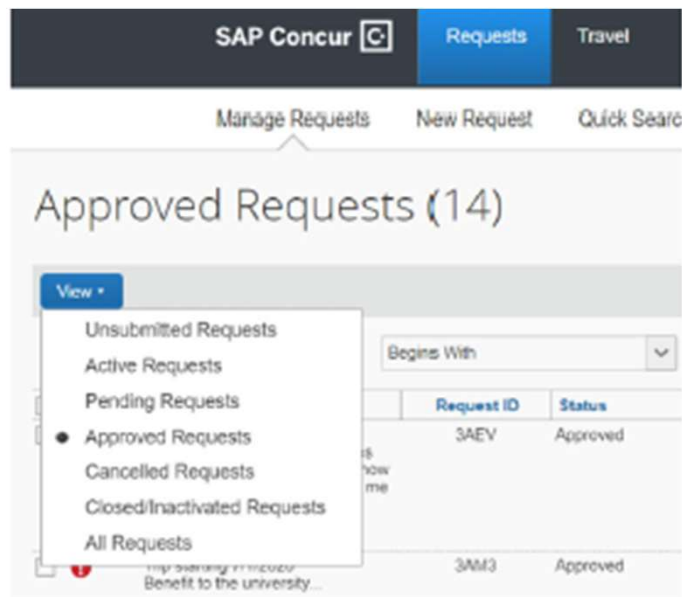
Cancel **Create New Request**

10. Review the Request Header and Expected Expenses for accuracy.
11. Attach documentation, as needed and then Submit the Request, as usual.

Closing A Request

If you have an approved Request for travel that has been completed and you do not need to create a expense report, the Request will need to be closed/inactivated.

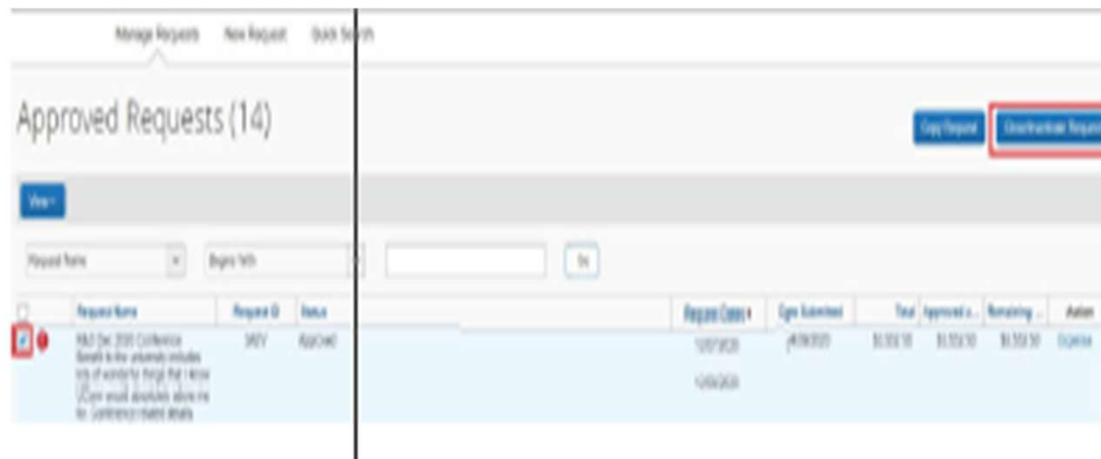
1. From the Concur homepage, click **Requests** from the **Home** dropdown in the upper left-hand corner.
2. Click the blue **View** button at the top left of the page and select **Approved Requests** from the drop-down menu.



The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', and 'Travel' tabs. Below this, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main content area is titled 'Approved Requests (14)'. A blue 'View' button is visible, and its dropdown menu is open, showing options: 'Unsubmitted Requests', 'Active Requests', 'Pending Requests', 'Approved Requests' (selected), 'Cancelled Requests', 'Closed/Inactivated Requests', and 'All Requests'. To the right of the dropdown, there is a 'Begins With' search field and a table with columns 'Request ID' and 'Status'. The table contains two rows: one with '3AEV' and 'Approved', and another with '3MM3' and 'Approved'. At the bottom of the page, there is a small logo and the text 'Benefit to the university...'

Closing A Request – 2

3. Click the checkbox beside the approved Request that you do not need to create an expense report for.
4. Click the **Close/Inactive** button at the top right of the page.



Cancelling or Changing Airline, Rental Car or Hotel Reservation

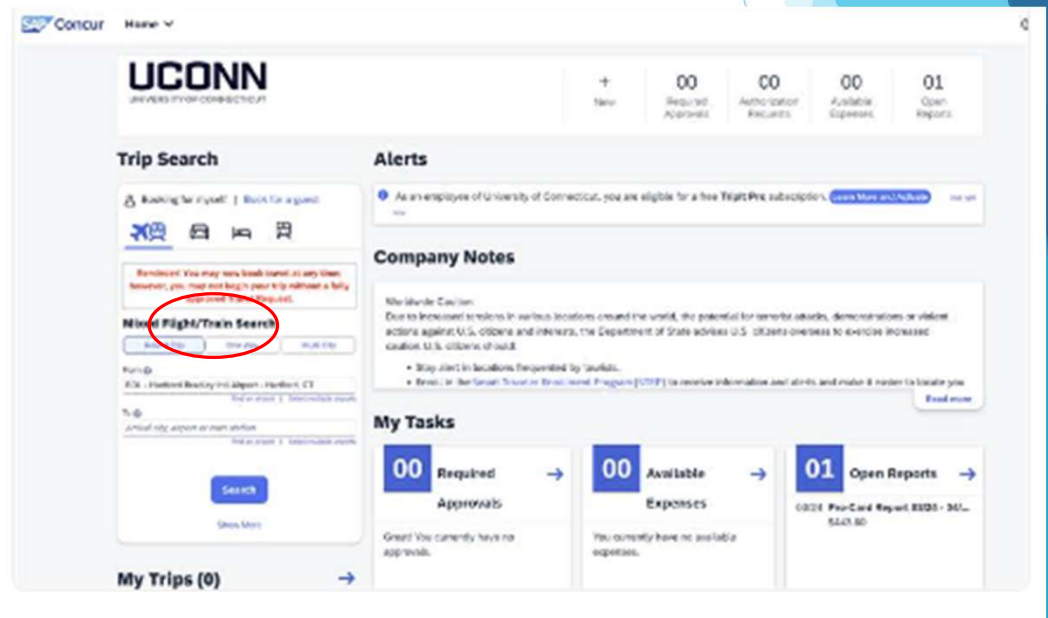
How to Expense a Cancelled Trip

If an upcoming trip requires **changes or a partial cancellation**, please contact Anthony Travel for Assistance.

If an upcoming trip requires a **full cancellation of all segments**, you have the option of canceling your booking online in Concur or contacting Anthony Travel for assistance.

Follow the instructions below to complete a **full cancellation of all segments** on your trip in Concur.

1. Click Travel at the top of the Concur page.
2. In the Travel module, click **Upcoming Trips**.
*To review trip details, click on the link under **Trip Name/Description**.*
3. Click **Cancel Trip**.



Canceling or Changing Airline, Rental Car or Hotel Reservation-2

4. The **Cancel Trip** popup box will display.
Enter any comments you would like to add for reporting purposes.
5. If a hotel was booked as a part of the trip you are cancelling, Concur will display the **Rules and cancellation policy**. Click the **check box** to agree and click **Continue**.
6. The cancellations details will display with a message confirming **your trip has been successfully cancelled**.

The Full Request Process

The background of the slide is white with abstract blue geometric shapes. On the right side, there is a large, complex shape composed of several overlapping triangles and polygons in various shades of blue, from light sky blue to dark navy blue. A thin, light blue line extends from the bottom right towards the center of the slide.

The Full Request Process

1. Log into Concur and navigate to your Request Module

UConn
UNIVERSITY OF CONNECTICUT

+ Start a Request
+ Start a Report
02 Authorization Requests
00 Available Expenses
01 Open Reports

Company Notes

Worldwide Caution
Due to increased tensions in various locations around the world, the potential for terrorist attacks, demonstrations or violent actions against U.S. citizens and interests, the Department of State advises U.S. citizens overseas to exercise increased caution. U.S. citizens should:

- Stay alert in locations frequented by tourists.
- Enroll in the Smart Traveler Enrollment Program (STEP) to receive information and alerts and make it easier to locate you in an emergency overseas.
- Follow the Department of State on Facebook and Twitter

[Read more](#)

Tasks

02 Open Requests → 05/01 test Travel 04/26 test Travel	00 Available Expenses → User currently has no available expenses. ✓	01 Open Reports → 04/24 Pro-Card Report 04/24 - 05/23 1690 \$110.48
---	--	--

2. Click New Request

The Full Request Process - 2

- You can then enter your upcoming trip details on the request header. (Your traveler type directly feeds from Core-CT and should not be edited)

Create New Request ✕

* Required field

Request Policy *
UCONN General

Trip Name *
Test

Does trip include a Level 3 or 4 Country/Region? *
N

Business Travel Start Date *
05/06/2024

Business Travel End Date *
05/09/2024

Trip Purpose *
Conference-Attending

Destination City *
Baltimore Washington Intl (Airport - BWI), Baltimore, Maryland

Traveler Type *
Staff

Trip Type *
Out-of-State

Will this trip include personal travel? *
None Selected

Personal Travel Dates ?
[Empty]

Business Purpose/Justification * 43/500
Attending Conference in Baltimore, Maryland

Account Number * 3
(2614020) Dramatic Arts Instruction

Sub-Account Number 4
(RCRUT) Recruitment expenses

Additional Information/Comment 0/500
[Empty]

Cancel **Create Request**

The Full Request Process - 3

Approving a Request

After reviewing request header details, expected expenses and attachments the Approver has options to:

1. Click **Approve** to approve the Request. The request moves to the next step in the approval process. The next approver in the workflow receives an email, identifying a new request is pending their approval.

Note(s): (1) As an approver you can alternatively Approve or Send Back the Request via the Concur Mobile App.

(2) If any part of the travel includes International travel, banned states, level 3 or 4 country/region, and/or embargo country, additional approval is automatically built into the Concur approval timeline.

(3) If the travel will be conducted by a nonresident alien student, the Fiscal Officer approver must complete the "Business Expense Certification" field. Concur will prompt the approver to complete this field when required. For additional information, refer to tax.uconn.edu/concur.

The Full Request Process - 4

2. You can then click the blue add button to add estimated expenses.

Home / Requests / Manage Requests / Test

Alerts: 2

Test

Not Submitted | Request ID: 73VX

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

The Full Request Process - 5

- It is most important that you include estimates for any airfare, hotel, and car rental. Please add any estimated expenses for your trip to the report so that your Fiscal Officer can budget appropriately. You will not be bound to these amounts as they are estimates, but it is best to make an educated guess on what the cost will be.

Round Trip One Way

Outbound * Required field

From * To *

Date * Depart at

Comment

Return

Date * Depart at

Comment

Estimated Amount * Currency

Save Cancel

New Expense: Hotel Reservation Cancel Save

Check-in * Required field

Date At City *

Check-Out

Date At

Comment

Estimated Amount * Currency

Save Cancel

New Expense: Car Rental Cancel Save

Pick-up * Required field

Pick-up Location * Date At

Drop-off

Drop-off Location * Date At

Comment

Estimated Amount * Currency

Save Cancel

The Full Request Process - 6

Attachments are needed for all conference related travel. You **MUST** upload the conference agenda to this request

1. Click the **Attachments** dropdown and then click **Attach Documents**, to attach a document to a request.

Home / Requests / Manage Requests / test

Alerts: 2

test \$602.50

Not Submitted | Request ID: 6YYD

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Baltimore, Maryland	04/26/2024	\$250.00	\$250.00
<input type="checkbox"/>		Air Ticket	Hartford (BDL) - Baltimore (BWI) : Round Trip	04/26/2024	\$180.00	\$180.00
<input type="checkbox"/>		Meal Per Diem Single Location	Baltimore, Maryland	04/26/2024	\$172.50	\$172.50
						\$602.50

test \$602.50

Not Submitted | Request ID: 6YYD

Request Details | Print/Share | Attachments

EXPECTED EXPENSE

Add Edit Delete Allocate

- View Documents
- Attach Documents
- Delete Documents

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Baltimore, Maryland	04/26/2024	\$250.00	\$250.00
<input type="checkbox"/>		Air Ticket	Hartford (BDL) - Baltimore (BWI) : Round Trip	04/26/2024	\$180.00	\$180.00
<input type="checkbox"/>		Meal Per Diem Single Location	Baltimore, Maryland	04/26/2024	\$172.50	\$172.50
						\$602.50

Document Upload and Attach

Upload and Attach

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.


Close

The Full Request Process - 7

2. Submit Request.

[Home](#) / [Requests](#) / [Manage Requests](#) / [Test](#)

Alerts: 2

Test \$951.50 

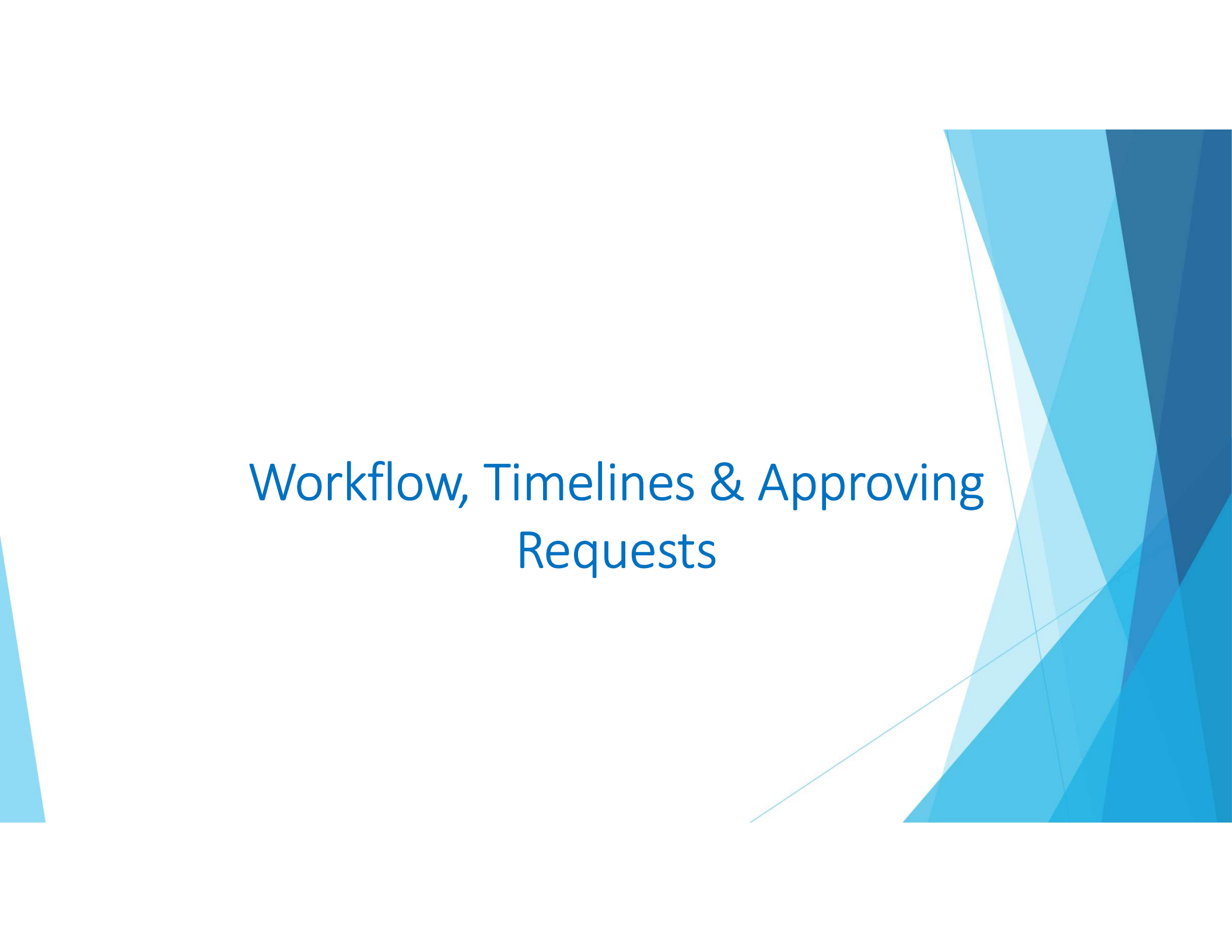
Not Submitted | Request ID: 73VX

[Request Details](#) [Print/Share](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type \updownarrow	Details \updownarrow	Date \downarrow	Amount \updownarrow	Requested \updownarrow
<input type="checkbox"/>	Car Rental	Baltimore, Maryland - Baltimore, Maryland	05/06/2024	\$230.00	\$230.00
<input type="checkbox"/>	Air Ticket	Hartford (BDL) - Baltimore (BWI) : Round Trip	05/06/2024	\$300.00	\$300.00
<input type="checkbox"/>	Hotel Reservation	Baltimore, Maryland	05/06/2024	\$180.00	\$180.00
<input type="checkbox"/>	Meal Per Diem Single Location	Baltimore Washington Intl (Airport - BWI), Baltimore, Maryland	05/06/2024	\$241.50	\$241.50 <small>Allocated</small>
					\$951.50

The background features abstract geometric shapes in various shades of blue, including light blue, medium blue, and dark blue, arranged in a dynamic, overlapping pattern. The shapes are primarily triangles and polygons, creating a modern and professional aesthetic.

Workflow, Timelines & Approving Requests

Travel Request Approval Workflow



Submit Request for Approval*



Routed to Traveler's Direct Supervisor**



Routed to Fiscal Officer(s) on Account(s) identified in Request

- Requests to travel to a banned state, embargo country, and Level 3 or 4 countries/regions will be routed for additional approval (e.g., export control, global affairs)

** Primary supervisor as it appears in CORE-CT

Concur | Approving Travel Requests

Reviewing A Request

1. An email will be sent to the appropriate approver when a request requires approval.
2. From the Concur homepage, navigate to the top of the page and click **Approvals**. The Approvals view displays.
3. Click the **Requests tab**. A list of requests pending approval displays.
4. Click the **Request Name** or **Request ID** of the appropriate travel request. The travel request details display.
5. Review the travel request details.
6. If the Requests contains any **Alerts**, click the drop-down arrow to the top right to review.
7. Click the **Request Details** drop-down arrow and select **Request Header** from the list. Review travel dates, purpose, destination, business purpose, account number, etc.

Note: Business Start and Business End Date should reflect the business travel dates, excluding any personal dates that may apply. Personal travel dates should be noted in the Personal Travel Date fields, as applicable.

Concur | Approving Travel Requests - 2

8. Add Additional Information/Comments as desired to the **Request Header**.
9. Review the **Expensed Expenses** menu. Click each expense to review details, including **Estimated Amount**.

Note: If a request does not include Air ticket, Car rental or hotel expenses that approver expects this traveler to incur during the respective trip, approve CAN send back to the traveler to update accordingly, and then traveler will resubmit for approval.

10. Click the Attachments dropdown, and then click View Attachments to review any attachments added to the Request. Approvers can also click attach documents to attach documents to a Request

Concur | Approving Travel Requests - 1

Edit Approval Flow/Approve And Forward

Concur allows any approver that currently has a request in their queue to add additional approvers to the Approval flow of the request timeline, as desired.

1. Click the **More Actions** drop-down arrow and select **Edit Approval Flow** or **Approve & Forward** from the drop-down menu.
2. Click **Add Step**. Click within the **User-Added Approver** field, and then click the filter icon to select the search criteria.
3. Type the approver's respective information in the search field. A filtered list of users displays.
4. Click to select a valid entry from the list of approvers. Click **Add Step** again and continue as needed to add additional approvers.
5. Click **Save**.
6. Click **Approve**. An email is sent to the new approver to notify them of a new request pending their approval.

Concur | Approving Travel Requests - 2

Edit Approval Flow/Approve and Forward

Concur allows any approver that currently has a request in their queue to add additional approvers to the Approval flow of the request timeline, as desired.

1. Click the **More Actions** drop-down arrow and select **Edit Approval Flow** or **Approve & Forward** from the drop-down menu.
2. Click **Add Step**. Click within the **User-Added Approver** field, and then click the filter icon to select the search criteria.
3. Type the approver's respective information in the search field. A filtered list of users displays.
4. Click to select a valid entry from the list of approvers. Click **Add Step** again and continue as needed to add additional approvers.
5. Click **Save**.
6. Click **Approve**. An email is sent to the new approver to notify them of a new request pending their approval.

Concur | Approving Travel Requests - 3

Send Back to Employee

When a travel request is incorrect (e.g., does not conform to University policy, is not approved for budgetary means, or for any other reason, etc.) you can send the request back to the employee.

7. Click the **More Actions** drop-down arrow and select **Send Back to Employee** from the drop-down menu.

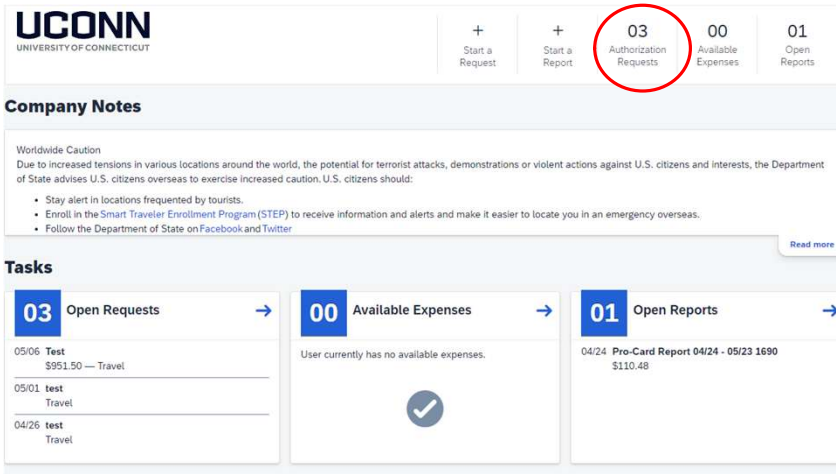


8. In the **Add Comment** field, enter a comment to the employee, explaining the reason for sending back the request.
9. Click **Send Back**. The request is sent back, and an email notification is sent to the employee.

Reviewing The Request Approval Timeline

After submitting a Request, you may want to check whose approval your Request is currently pending, or which request timeline step has already been approved.

1. From the Concur homepage, click **Requests** from the **Home** dropdown in the upper left-hand corner.

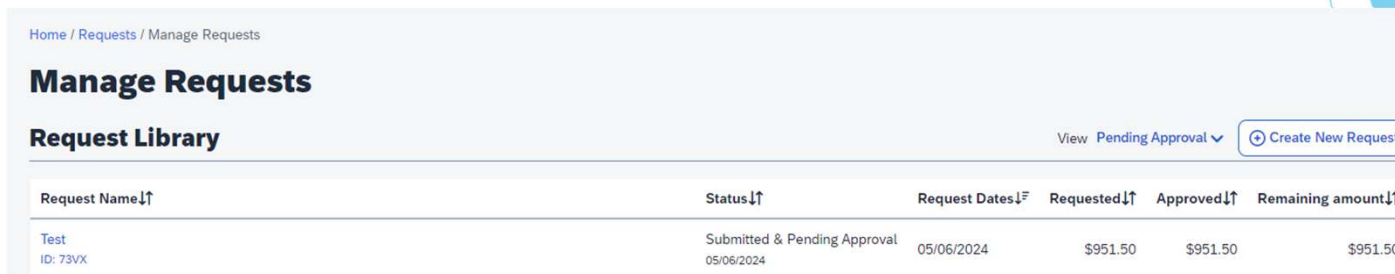


The screenshot shows the UConn Concur homepage. At the top, there is a navigation bar with the UConn logo on the left and five menu items on the right: '+ Start a Request', '+ Start a Report', '03 Authorization Requests' (highlighted with a red circle), '00 Available Expenses', and '01 Open Reports'. Below the navigation bar is a 'Company Notes' section with a 'Worldwide Caution' notice. Underneath is a 'Tasks' section with three cards: '03 Open Requests' (with a list of items), '00 Available Expenses' (with a checkmark and the text 'User currently has no available expenses.'), and '01 Open Reports' (with a 'Pro-Card Report' entry).

2. Click the drop-down arrow beside 'View' at the top of the page and select '**Pending Requests**' from the drop-down menu.

Reviewing The Request Approval Timeline – 2

3. Click on the **Request name** that you would like to review.



Home / Requests / Manage Requests

Manage Requests

Request Library

View Pending Approval [Create New Request](#)

Request Name↓↑	Status↓↑	Request Dates↓↑	Requested↓↑	Approved↓↑	Remaining amount↓↑
Test ID: 73VX	Submitted & Pending Approval 05/06/2024	05/06/2024	\$951.50	\$951.50	\$951.50

4. With the Request open, click the **Request Details** drop-down arrow then select **Request Timeline** from the drop-down menu.



Request Timeline

Test | \$951.50

Approval Flow

- Direct Supervisor Approval
Bridgeman, Colleen
- Fiscal Officer Approval

Request Summary

SUBMITTED
Caron, Cynthia 05/06/2024

SUBMITTED & PENDING APPROVAL
Caron, Cynthia 05/06/2024

Reviewing The Request Approval Timeline – 3

5. You will now see each approval timeline step with the name of the corresponding approver. If a step has been previously approved, the approval flow step will show a green circle and checkmark. The approval date will also show to the right under the word **Approved**.

The background features abstract geometric shapes in various shades of blue, including light blue, medium blue, and dark blue, arranged in a modern, layered composition. The shapes are primarily triangles and polygons, some overlapping to create a sense of depth and movement. The overall aesthetic is clean and professional.

AAUP/OVPR Travel Award

Receiving an AAUP/OVPR Travel Award

Faculty Travel Funding

Receiving an AAUP/OVPR Travel Award **does not infer that such travel has been approved by the University**, only that the awardee has travel funding available to reimburse expenses from approved travel. Before traveling or making travel arrangements:

- All Faculty must obtain approval from their department or unit head, per the AAUP contract.
- Faculty traveling internationally must obtain approval from Global Affairs.
- Faculty traveling to embargoed regions (currently Cuba, Iran, Syria, North Korea, and Crimea) must seek approval from OVPR Export Control.

Guidelines

Receiving an AAUP/OVPR Travel Award - 2

Before You Apply

Before making travel, arrangements or traveling, all faculty **must**:

- Obtain pre-approval from their department or unit head ([per UConn AAUP contract](#))
- Obtain pre-approval from [Global Affairs if traveling internationally to a Level 3 or 4 destination](#)
- Obtain written pre-approval from OVPR Export Control before booking travel to [embargoed regions](#)
- Obtain written pre-approval from dean, director, or department head if destination is subject to [State travel ban](#)

If you are participating virtually, you **do not** need to submit a Travel Request via Concur, since no travel is taking place.

Receiving an AAUP/OVPR Faculty Travel Award **does not infer that such travel has been approved by the University**, only that the awardee has funding available to reimburse expenses from approved travel. **Failure to follow appropriate policies and procedures related to University travel may result in unreimbursed out-of-pocket expenses for individuals.** The following guidance can ensure all faculty and staff avoid such situations.

Reminder: Any activity related to your faculty position for which you receive outside compensation, honorarium, or other form of payment (including payment of expenses) may require review and approval by the [Faculty Consulting Office](#). Travel or other Professional Development costs relating to or overlapping with outside consulting activities are not eligible for reimbursement under the AAUP/OVPR Faculty Travel Funding Program.

Receiving an AAUP/OVPR Travel Award - 3

Due to the popularity of this program and demand exceeding supply of funds, faculty are encouraged to apply as soon as they are aware of the travel opportunity. Funds are limited, and awards are not guaranteed.

Requests for reimbursement must be submitted within 60 days of travel ending. Failure to submit reimbursement within 60 days may result in travel costs being assumed by the traveler/department.

Once all funds for the FY are fully committed, the OVPR reserves the right to close down the request portal so that no new requests may be submitted.

It is strongly recommended that all University travel is booked through UConn's travel agent, Anthony Travel, using the University-sponsored Travel Card (T-Card). Anthony Travel has a dedicated UConn agent. Travel can also be booked online within the Concur system where you can search for flights similar to the Expedia application.

If you book travel independently and have to cancel this travel, you will be responsible for any resulting costs that will not be reimbursed by the University. For instance, if you book a non-refundable flight on Expedia and then have to cancel this travel due to the pandemic, you will not be reimbursed for the ticket. Anthony Travel will support any cancellation or postponement of travel that they have booked, including obtaining credits for the unused tickets. There are no booking fees or agent fees charged back to the department when using Anthony Travel.

Receiving an AAUP/OVPR Travel Award - 4

Funding Sources and Criteria

This program unites two sources of faculty travel funding under a common set of guidelines and through a [common request portal](#).

Funding pools run on the fiscal year (FY) cycle (July 1 – June 30).

Award funds cannot be transferred in part or in whole to other trips.

AAUP Professional Development Fund

- Per UConn AAUP contract (applicable to Storrs and Regional Campus), “each eligible full-time faculty member shall, upon request, receive up to \$2,200 from the Professional Development Fund for any academic-related travel expenses...
- **...so long as such funds are available”** (Article 19.6, Sec. F, Item iii).
- Academic related travel
 - Related to research and teaching-focused conferences, academic workshops, and other professional development opportunities
 - Includes transportation, lodging, registration, per diem, etc.

Receiving an AAUP/OVPR Travel Award - 5

Funding Sources and Criteria

- 1st source of funding for all requests (regardless of type of participation)
- Per UConn AAUP contract, 30% of AAUP Professional Development Fund will be reserved until February 1 for “junior” faculty (defined as terminal degrees earned within past 7 years; Article 19.6, Sec. F, Item iv).
- Sole source for non-active participation (aka Attendance Only)

OVPR Faculty Travel Fund

- Augments the AAUP funding
- **Added requirement that funds only support dissemination of research results** (active participation as a speaker/presenter) at conferences/professional workshops
- Awarded only when AAUP funds are expended or otherwise not available

Receiving an AAUP/OVPR Travel Award - 6

Faculty Eligibility

Eligibility varies based upon funding source.

Individual maximum of \$2,200 is inclusive of both AAUP and OVPR funds and runs on the fiscal year (FY) cycle (July 1 – June 30).

Per UConn AAUP contract, 30% of AAUP Professional Development Fund will be reserved until February 1 for “junior” faculty (defined as terminal degrees earned within past 7 years; Article 19.6, Sec. F, Item iv).

AAUP fund

- Full-time UConn faculty
- Members of the UConn AAUP
 - Includes regional campuses, full-time Lecturers, Adjuncts teaching 2 or more courses now and each semester for the past two years
 - Excludes faculty in Law, Medicine, Dental Medicine, visiting faculty, Emeritus Faculty

OVPR fund

- Full-time UConn faculty
- Members of the UConn AAUP
 - Includes regional campuses, Law School
 - Excludes faculty in Medicine or Dental Medicine, lecturers, adjuncts, visiting faculty, Emeritus Faculty

Receiving an AAUP/OVPR Travel Award - 7

Request Process

Common Request Portal

One trip per request

- Submit at least 10 days prior to departure to ensure adequate processing time.
 - Requests submitted fewer than 10 days before departure may not be processed before your travel begins.
 - **Requests cannot be funded once travel has commenced.**
- **Before** making travel arrangements or traveling, all faculty **must submit a Travel Request via Concur in order to:**
- Obtain pre-approval from their department or unit head ([per UConn AAUP contract](#))
- Obtain pre-approval from [Global Affairs if traveling internationally to a Level 3 or 4 destination](#)
- Obtain written pre-approval from OVPR Export Control before booking travel to [embargoed regions](#)
- Obtain pre-approval from dean, director, or department head if destination is subject to [State travel ban](#)

Trips spanning funding periods or fiscal years will be considered part of the period or year in which the greater number of travel days occur.

Receiving an AAUP/OVPR Travel Award - 8

Requests will be considered on a first-come, first-served basis. The amount awarded will be determined by the qualifying amount providing all budgeted funds are available, individual fiscal year allotments have not been reached, and all of the submitted information is accurate.

Due to the popularity of this program and demand exceeding supply of funds, faculty are encouraged to apply as soon as they are aware of the travel opportunity. Funds are limited, and awards are not guaranteed.

Reminder: Any activity related to your faculty position for which you receive outside compensation, honorarium, or other form of payment (including payment of expenses) may require review and approval by the [Faculty Consulting Office](#). Travel or other Professional Development costs relating to or overlapping with outside consulting activities are not eligible for reimbursement under the AAUP/OVPR Faculty Travel Funding Program.

Need to make changes? Please email your detailed request to research@uconn.edu.

Did you cancel your trip? Please email research@uconn.edu to let us know.

- Award funds cannot be transferred in part or in whole to other trips.
- Unused funds will be returned to the funding pool for redistribution.
- Value of unused funds will be returned to the traveler's annual fair share maximum.

Receiving an AAUP/OVPR Travel Award - 9

Status Markers

- Pending: Your request was successfully submitted and is awaiting review
- Approved: Your request was funded
- Not Funded: Your request was not funded. Some, but not all, possible reasons are listed below. Reviewers often make notes which can be found near the top of the notification email.
 - You have already reached your \$2,200 limit for the fiscal year
 - All monies from the AAUP and/or OVPR funding pools are fully committed for the travel period (i.e. Fall or Spring)
 - You did not submit 10 days prior to departure, allowing reviewers sufficient time to process your request, and funds cannot be awarded once travel has begun
 - It may be the case that committed travel funds will go unused. Unused funds will be returned to the appropriate pools from which they originated, and applications previously Not Funded due to drained pools will be reconsidered in the order in which they were originally submitted, provided the proposed travel dates have not yet come to pass.

Receiving an AAUP/OVPR Travel Award - 10

Post-Trip Requirements - Reimbursement Process

Please collaborate with your department's staff to request reimbursement of expenses upon completion of travel.

All awards are for reimbursement of travel expenses only.

- Reimbursements from OVPR award funds must include evidence of active participation.
- See also "[Covered Expenses](#)".

Requests for reimbursement must be submitted within 60 days of travel ending. This mirrors [UConn Travel policy](#).

Awards expire after 90 days

- Awards will be closed after this period
- Award funds cannot be transferred in part or in whole to other trips.
- Unused funds will be returned to the funding pool for redistribution.
- Value of unused funds will be returned to the traveler's annual fair share maximum.
- Exceptions only in special cases and with significant justification.
- Exceptions must be requested before award expires.

Receiving an AAUP/OVPR Travel Award - 11

Post-Trip Requirements - Reimbursement Process

- Travel costs related to expired awards (that haven't been granted exceptions) will be assumed by the traveler/department.

Reminder: Per [updated UConn Travel Policy.pdf](#) "reimbursements submitted over 120 days after travel is complete will not be reimbursed even with the approval from a Dean, Director, or Department Head."

Reminder: Any activity related to your faculty position for which you receive outside compensation, honorarium, or other form of payment (including payment of expenses) may require review and approval by the [Faculty Consulting Office](#). Travel or other Professional Development costs relating to or overlapping with outside consulting activities are not eligible for reimbursement under the AAUP/OVPR Faculty Travel Funding Program.

Staff members: When charging the travel award account in Concur, please include the award number in the line item description. Also, please include in a Note the AAUP/OVPR Faculty Travel Award # and attach it. If not all award monies were used, you are also encouraged to note this, and by how much.

Professional Development Fund Award Program

The UCPEA Professional Development Award Program Application page can be found at:

[UCPEA](#)

For UCPEA Professional Development information or support, please contact the UCPEA Office at 860-487-0850.

Scholarship Facilitation Fund Guidelines

Scholarship Facilitation Fund Guidelines

APPLICATION GUIDELINES

Requests for SFF support must be submitted through the UConn Quest Portal's [online application form](#), and should include:

- **Project Description** (Limit: 2000 characters/250 words). Describe the activities you wish to undertake in the project, the scholarly products (publications, grant applications etc.) that these activities will enable, and your proposed timeline for these activities.
- **Budget and Justification** (Limit: 2000 characters/250 words). Break down (itemize) the costs related to this project and provide justification as to why each is necessary and reasonable for the work described in the project description. It is important to list each cost separately and provide information regarding how cost estimates have been reached.
 - The following items cannot be requested: **faculty, clerical or administrative personnel salaries**, including personnel whose primary purpose is to explore funding sources and/or prepare grant applications; service/maintenance contracts on equipment; laboratory renovations, or other infrastructure renovations; institutional memberships in professional organizations; travel to professional meetings to present the results of research; travel to explore extramural funding opportunities. SFF budgets must specify how funds will be used to advance/complete a specific aspect of a faculty project; SFF funds will not be granted solely to provide support or gap funding for personnel.
- **Funding Need** (Limit: 2000 characters/250 words). Address all other sources of funding you may have available for this project. Providing some level of explanation of the funding need (even if there are no other resources available) is critical for contextualizing SFF requests. Requests that do not address funding need will have lower funding priority.
 - Include external funding earmarked for this project and what it will cover
 - Discuss existing start-up or IDC funds and what they will cover or why they are not available for the project
 - Describe any cost-matches that have been offered by department or school/college. The willingness of other units to contribute to the costs of the project will be viewed as a positive factor when evaluating SFF requests
 - Describe the importance of SFF funding for the continuation/success of the project.

Questions?

Please email Cindy Caron at gpb24001@uconn.edu
or Travel at travel@uconn.edu.
We are always happy to help!