Objectives

By the end of today’s session, you will know

- Why Purdue has changed the travel process.
- What the expectations are for using your new Travel Card.
- How the travel card is integrated into Concur Travel & Expense.
- How to get started using your card and Concur
- Who to contact if you run into problems.
Why the Changes?

- To streamline the travel process
- To automate booking, authorization, and reimbursement
- To provide improved services to travelers through contracted travel agency
- To obtain data on travel spend for leverage in negotiating future discounts
- To provide improved risk management
- To reduce out-of-pocket expenses to travelers with a travel card.
What are the Changes?

- Paper travel forms are being eliminated
- Departmental approvals are no longer part of the pre-trip documentation
- Egencia and Hotels.com accounts are being cancelled
- American Express Card accounts are being cancelled
- Prepayment by Accounting Services is being eliminated.
Change in Approval Process

Employees are now responsible for managing their own prior approval processes for travel. CONCUR DOES NOT PROVIDE APPROVAL WORKFLOW. Employees are liable for all travel expenses not covered by their department or other funding sources.

Be sure to discuss your travel plans with your supervisor BEFORE incurring any travel expenses or making any reservations.
A Few Words about the Concur Request

- Concur contains a feature called a “Request”
- It is required whenever air or non-commuter train travel is used.

- The Concur Request is NOT used to request permission to travel.
- The primary purpose of the Concur Request is to NOTIFY the traveler’s supervisor and other university constituencies of pending travel plans.
- The secondary purpose of the Concur Request is to request Cash Advances, fare upgrades, and External Sponsor approval of travel where required.
- The Concur Request is completed AFTER booking, not before.
Notification Requirements

- The Concur Request generates notifications to:
  - The Traveler
  - The Traveler’s Supervisor
  - The Traveler’s delegate
  - The Fiscal Approver for the Primary Funding Source
  - The Chief of the Primary Funding Source
  - The Co-PI if the Primary Funding sources is a sponsored program

Additionally, if the trip involves international travel, the Concur Request is viewable by the offices of Risk Management and International Programs.
Benefits of Using the Travel Card

- Reduced out-of-pocket expenses
- ATM cash advance during travel
  - Up to $500 per cycle
  - ATM fees reimbursable
- Emergency Evacuation Insurance
- Insurance Coverages
  - Worldwide Travel Accident Insurance $500,000
  - Common Carrier Baggage Reimbursement $1,250
  - Rental Car Collision Damage Waiver
  - Hotel/Motel Burglary Reimbursement $1,000
Typical Uses of the Card

- Airfare
- Lodging
- Car Rental, including gasoline
- Registration
- Parking
- Ground Transportation
- Meals*
- Cash Advance

*Meals are an allowable business expense and may be charged to the Visa Travel Card while in travel status. These items are non-reimbursable and should be charged to “Meal Expense” and marked “personal” on an Expense Report and will not be reimbursed. Meals that will NOT be reimbursed may include alcohol. The reimbursement will be for the appropriate per diem.
Stewardship of your Travel Card

Source: Purdue Travel Card Manual

- Cardholders must have proper approval to use the card.
- Cardholders are expected to ensure that all card charges
  - Comply with University policy,
  - Are properly itemized,
  - Are supported by a business purpose, and
- Cardholders are expected to complete expense reports within 30 days after completion of each trip.
- Cardholders must repay all credit card expenses in excess of approved amounts.
Stewardship of your Travel Card (cont.)

Erroneous Charges, Disputed Items, or Returns
• Contact the merchant first.
• If unable to reach agreement with the merchant, contact JPMorgan Chase
• File a dispute Form if directed to do so by the bank.
• Maintain a copy of all filed dispute forms.

Lost or Stolen Cards
• Report to JPMorgan Chase for cancellation immediately.
• Notify PCO at tcard@purdue.edu.
• Notify University Police, if appropriate
Stewardship of your Travel Card (cont.)

Source: Purdue Travel Card Manual

**ATM Cash Advances (up to $500 per billing cycle)**
- Not allowed when not in travel status
- Not to exceed the amount of anticipated expenses
- Not to be used for expenses that should be charged to the credit card

**Other Travel Card Restrictions**
- No personal expenses
- No non-business travel use
- The card is for YOUR business travel only. You cannot use it to purchase tickets for other university employees.
- No alcohol charged to university accounts.
Reconciling your Travel Card Account

- All travel card charges are posted to your user account in Concur.
- Travel card charges are reconciled by assignment to an Expense Report in Concur.
- Travelers may complete expense reports themselves, ask a delegate to prepare it for them, or meet with the travel clerk in Accounting Services to have the reports prepared.
- Travelers must submit their own reports themselves.
- Purdue will deduct from your paycheck any amounts due after submitting an expense reports, such as:
  - Unused cash advance amounts
  - Meal expenses in excess of allowable subsistence
  - Unallowable charges made to the travel card.
How to Get Started with Your Travel Card

1. GATHER YOUR PURDUE CREDENTIALS
   • PUID
     • Used in place of SSN
   • Purdue Career Account
     • Needed for Concur login

2. ACTIVATE YOUR CARD!
   • Call the number on the sticker on the FRONT of your card to activate the card. You will be prompted for your card number and the last four digits of your Social Security Number. USE THE LAST FOUR DIGITS OF YOUR PUID.
   • Remove the sticker from your card after activation.
   • Call the number on the BACK of the card to establish a PIN for ATM use, and to find out what your credit limit is.
How to Get Started with Your Travel Card

3. Log into Concur.
4. Set up your Concur Profile
   a) Make sure your profile name matches your photo ID
   b) CHANGE YOUR EMAIL ADDRESS TO YOUR IPFW.EDU EMAIL
   c) Activate e-Receipts on your account
   d) Complete mobile registration if you intend to use the Concur mobile app.
5. **Familiarize yourself Concur Travel & Expense.**
Travel News (updated 2/3/2014)
Concur is LIVE!
Beginning Monday, February 3, Accounting Services is distributing travel cards to employee travelers during orientation sessions taking at the following times:
Concur Travel and Expense Reference

Overview  Profile Maintenance  Travel Requests  Expense Reports  Travel Cards

Concur Reference Material

This section of the web site contains instructions guides and video demonstrations of the Concur Travel and Expense program. The References are divided into the following categories, each on its own tab:

- Profile Maintenance
- Travel Requests
- Expense Reports
- Travel Cards
Need Help?

Who to contact:
- Your department secretary
- Your business manager or account clerk
- Judy Bondar (bondarj, 16220)
QUESTIONS?
Please present a photo ID and initial the travel card log.