

Travel Checklist

Please use this checklist as a guideline for the order in which arrangements for conference travel should be made. **Please follow these steps in order.**


- 1) Prior to any travel, **ALL** CCN Faculty and Staff should be set-up in concur. If you do not have an account set up, the first step is to request user access.
 - You will have to sit through a virtual concur training before gaining access to concur.
 - * **Requesting User Access to concur:** Go to Mybama, click on the Employee tab, scroll down and on the right side of the screen you will see a box that says concur, under concur you will see Request User Access, click the Request User Access button, you will then see a red button to the right of your screen, press the Concur Pcard User Access Form button, please fill out the form, please do not change any pre-filled information on the form, click submit. You will be emailed about your training and again when you have received access to concur.

- 2) Once you have gained access to concur, your next step is to go under your profile settings and set Kimberly Lolley and Charles Tunnell as your delegates.
 - This gives us access to your concur account in case we need to do something for you, or to look over anything you have done.
 - * **Setting up a delegate in concur:**

Setting Up A Delegate

Concur allows the user to setup a delegate who will be able to prepare Travel Requests, Expense Reports, and Payment Requests on your behalf. This does not remove the user's responsibility to review and submit the request or report.

Approvers may set up a delegate to assist with their duties.

1. Click **Profile**, and then **Profile Settings**.
2. Click the **Delegates** section for the module you want to work with. (Ex. Expense Delegates, Request Delegates, or Invoice Delegates)
3. Click **Add**. 
4. Use the search box to find the delegate and click **Add**.
5. Use the check boxes to assign permissions to the delegate.
6. Click **Save**.

3) If you are planning to attend a conference out-of-state (not paid for by a grant) please continue to the next step. If you are planning to attend an in-state conference or if a grant is covering your expenses, please skip to step number 5.

- If you will be travelling to an international conference, please contact Kimberly Lolley immediately to go over next steps, as there will be additional paperwork to fill out.

4) Once you have determined which conference you would like to attend, you will need to submit a Pre-Trip Approval Form.

- This form is required for **ALL** out of state travel.
- The only way to skip this step is for those who are traveling in-state, or for those who are traveling out of state but will be using their grant to cover the expenses.
- Students do not have to submit a Pre-Trip Approval form. This form is only for Faculty and Staff.
- If you have start-up funds that you would like to use to help cover expenses, please note that on the form.

* **Pre-Trip Approval Form:**

[Pre-Trip Approval Form](#)

5) If you are travelling in-state or if you are travelling out-of-state and have a grant that will cover your expenses, then you will need to fill out the In-State/Grant Travel Request Form.

- This form is required by CCN for **ALL** in-state or grant reimbursed travel.
- This form should also be used for **ALL student travel** (in-state or out-of-state).
- If you would like to use your grant money or start-up funds to help cover your travel expenses, please note that on this form.

* **In-State/Grant Travel Request Form:**

<https://na2.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=79b2563a-17c4-4d40-b4fb-651c1d23e813&env=na2&acct=046ae80d-7495-4a39-a960-9a4b16ff5c0f&v=2>

6) Once you have submitted the Pre-Trip Approval or In-State/Grant Travel Request form and you have received the approved copy back, please email the approved form to Kimberly Lolley.

7) When you are ready to begin making travel arrangements, you will need to email or call Kimberly Lolley to set up an appointment for your booking.

8) **PLEASE DO NOT MAKE ANY TRAVEL ARRANGEMENTS OR PAY FOR ANY REGISTRATIONS PRIOR TO TALKING WITH KIMBERLY.**

- At this point, no flights, hotels, or conference registrations should be purchased yet.
- No one should be purchasing or making any travel arrangements until you receive a copy of the **APPROVED** Pre-Trip Approval or In-State/Grant Travel Request forms.

9) Once we have set up your appointment, we are finally ready to book your accommodations. We will make your arrangements in the following order.

- First, we will get you registered for the conference you are attending.
- Next, we will reserve your hotel room.
- Lastly, we will book your flight to and from the conference.

10) You should be emailed a receipt for your conference registration. Please forward that receipt to Kimberly Lolley. I should be able to pull your flight receipt.

11) A few weeks before your conference please reach out to Kimberly again. We will need to contact the hotel to receive a credit card authorization form for you.

- This form will allow the hotel to charge the university Pcard and not your personal card.
- **IF THIS FORM IS NOT FILLED OUT, THE HOTEL WILL CHARGE YOUR CREDIT CARD NOT THE PCARD.**
- Upon checkout, please double check with the hotel that they have received the credit card authorization form, which is usually emailed or faxed, and that they will be charging the Pcard. We have had a few instances where personal credit cards were charged even though the hotels had the credit card authorization form.

12) When checking out of your hotel, please make sure the hotel either emails you a copy of the final folio or prints you a copy. Please send Kimberly Lolley the hotel receipt upon your return.

13) Please note, if you are traveling in-state and require an overnight stay, we will not be making your hotel arrangements, you will need to make your own.

- **Hotels for in-state travel are covered under per-diem, which is reimbursed after your trip.**

14) Once you have arrived back from your trip, and if you have money left over from your approved amount, we can then reimburse you for per-diem, ubers, airport parking and mileage.

- Per-diem for out-of-state travel covers your food costs. **I DO NOT NEED YOUR FOOD RECEIPTS.** Concur makes the appropriate calculations based on where you traveled to. It can also be adjusted to give you a partial reimbursement.
- Per-diem for in-state travel covers your food and hotel costs. **I DO NOT NEED YOUR FOOD OR HOTEL RECEIPTS FOR IN-STATE TRAVEL.** The current Per-diem rate is as follows: 6-12 hours \$12.75, More than 12 without an overnight stay \$34.00, Each day with a 1 night stay \$85.00/day, Each day with 2 or more nights \$100/day.
- If you want reimbursements for an uber or hotel parking, I will need receipts for those.
- Reimbursement for mileage is currently 62.5 cents per mile until 12/31/2022.

15) After we have determined what reimbursements you have, if any, I will create a concur report for you as your delegate. Once the report is completed, you will log-in to concur and press the submit report button.

16) Congratulations you have completed your trip with CCN!!!