

## **Biology Travel Hints**

1. Calculate budget for travel
2. Open the Biology Travel google doc:  
<https://docs.google.com/forms/d/e/1FAIpQLSeNgAvZ9SM0oCQmLAUM3jtErv0G5X2Sii5vtTus2OGmuWR48g/viwwform>
  - a. You may need to sign in for the form to populate
  - b. If you are submitting on a grant or research fund, you will need to have the PI submit due to fund approval requirement.
3. Fill in the form and submit
  - a. Grant Specialist or Department Admin. will handle obtaining the CHAIR and College approvals
  - b. Trip number will be created for you and emailed to you along with your pre-approval documents
4. Book travel according to budget
  - a. Flights need to be booked in the concur tool (myslu, tool, concur (green suit case)
  - b. Hotels need to be booked in the concur tool (you will be required to pay for this expense at time of checkout)
  - c. Car rentals need to be booked in the concur tool (you will be required to pay for this expense at time of return)
  - d. CONFERENCE HOTEL do NOT get booked in the tool, you will need to book directly with the conference. In order to expense the conference hotel you need to supply the conference dates and location. You will also need to supply the published conference room rates.

## **BIOLOGY EXPENSE REPORT HINTS**

1. Open concur and create a new report (myslu, tools tab, green suitcase)
2. Click on Expense
3. Create new report
4. Select the report type
  - a. TRAVEL report should be named the trip number (AXXXXXX)
  - b. NON-Travel should be named according to the report (Sept 2017 or Home depot 01/01/2018)
5. Click on import expenses and import any reservation or charge that pertains to the report.
6. Select the expense type that matches your receipt and enter according to the receipt.
7. Upload all receipts and conference information (if applicable). See page below for receipt policy per B&F travel.
8. Email Grant specialist or Department Admin. to review report
  - a. Once the email is received the report will be reviewed for policy and accuracy.
  - b. If there are no issues with the report, it will submit on your behalf.
  - c. If there are issues with the report, you will receive an email with the instructions of what is needed.

**NOTES and hints:**

1. Grant and Department funds will not reimburse for alcohol.
2. Please try to obtain itemized receipts as much as possible.
3. If you don't have access to concur you will need to send an email to the Department admin. You will need to include your banner number and your SLU userid.
4. Pre-Approval expense can be reimbursed as soon as proof of payment is available. You do not have to wait for the travel to happen to expense these items. (conference registrations, abstracts or deposit of hotel if required)

# Travel Receipts and Documentation Requirements

## AMEX T&E Card Policies and Procedures

\* The Amex Card Statement is not a valid receipt for those expense types that require additional itemization for review of policy compliance

\*\* Applicable documents and receipts should be submitted in the order above. The first item behind the expense report should always be the statement, then the Invoice Detail, followed by documentation and receipts for each expense type in the order above.

| Expense Type                                       | Required Receipt and Documentation**   |
|--|--|
| All Expense Reports with American Express Charges  | <ul style="list-style-type: none"> <li>Current American Express Corporate Card Statement</li> </ul>  |
| Ground Transportation (taxi, shuttle, car service) | <ul style="list-style-type: none"> <li>Original receipt for charges over \$50</li> <li>Amex Card <b>is</b> valid receipt</li> </ul>  |
| Automobile Rental*                                 | <ul style="list-style-type: none"> <li>Original Receipt<br/><b>and</b></li> <li>American Express Invoice Detail</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul>  |
| Parking/Tolls/Gas                                  | <ul style="list-style-type: none"> <li>Original receipt needed for charges over \$50</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul>   |
| Lodging*   | <ul style="list-style-type: none"> <li>Itemized hotel receipt<br/><b>and</b></li> <li>American Express Invoice Detail<br/><b>or</b></li> <li>Conference detail showing published conference rate</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul> |
| Registration Fees*                                 | <ul style="list-style-type: none"> <li>Original receipt and</li> <li>Conference detail showing published conference rate</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul>   |
| Business Communications*                           | <ul style="list-style-type: none"> <li>Original receipt (most cases on hotel receipt)</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul>  |
| Business Purchase*                                 | <ul style="list-style-type: none"> <li>Original receipt and justification</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul>  |
| Personal Meals                                     | <ul style="list-style-type: none"> <li>Original receipt for over \$50. Maximum reimbursement government government daily meal per diem for locality (see travel policy for additional per diem information).</li> </ul>  |

|                  |   |
|------------------|---|
|                  | <ul style="list-style-type: none"> <li>Amex Card Statement <b>is</b> valid receipt</li> </ul>   |
| Tips/Incidentals | <ul style="list-style-type: none"> <li>Tips - maximum reimbursement to porters, average of \$5 per travel day.</li> <li>Incidentals - original receipt for over \$50.</li> <li>Amex Card Statement <b>is not</b> valid receipt</li> </ul> |
| Business Meals   | <ul style="list-style-type: none"> <li>Original receipt for over \$50.</li> <li>List of attendees and their relationship to SLU.</li> <li>Amex Card Statement <b>is</b> valid receipt</li> </ul>  |

[https://www.slu.edu/busfin/departments/card-programs/amex-travel-and-entertainment-card-\(tande-card\)/policies-and-procedures-for-tande-card/appendix-f-travel-receipts-and-documentation-regs](https://www.slu.edu/busfin/departments/card-programs/amex-travel-and-entertainment-card-(tande-card)/policies-and-procedures-for-tande-card/appendix-f-travel-receipts-and-documentation-regs)