

# INTRODUCTION TO TRAVEL AND EXPENSE REPORTING

**September 23,  
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Office of the  
Vice President  
for Finance

# Presenters

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# Training Objectives

- Review Travel Policies
- Review Concur Navigation
- Identify Travel Resources



# Travel Reporting Update & Review

**APPLY**

Application Process Review

**BOOK**

Booking Options Review

**TRAVEL**

Required Documentation Review

**REPORT**

Introduction to Concur Changes

**PAYMENT**

Payment Options Review

# Types of Credit Cards

## Individual Travel Card

- Linked to the traveler's Concur profile
- Expenses feed directly to traveler's profile

## Department Travel Card

- Used by department coordinators who book trips for groups
- Card is in the name of the department with the cardholder as responsible person (line two)

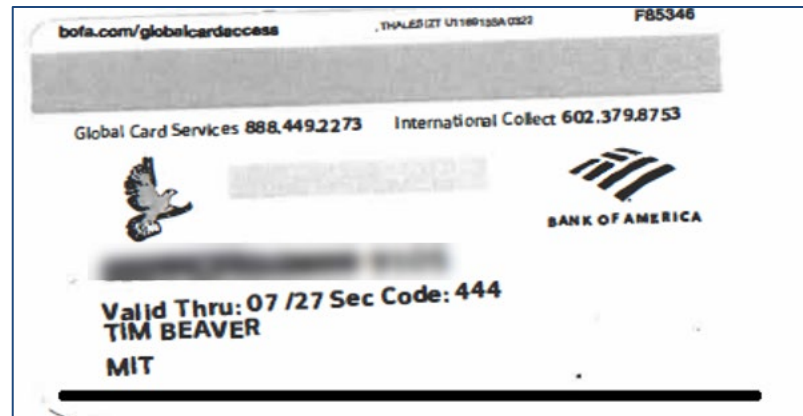
## Procurement Card

- Goods \$3,000 or less
- No travel or services (see list of restrictions in P-card training)

# Travel Card Application

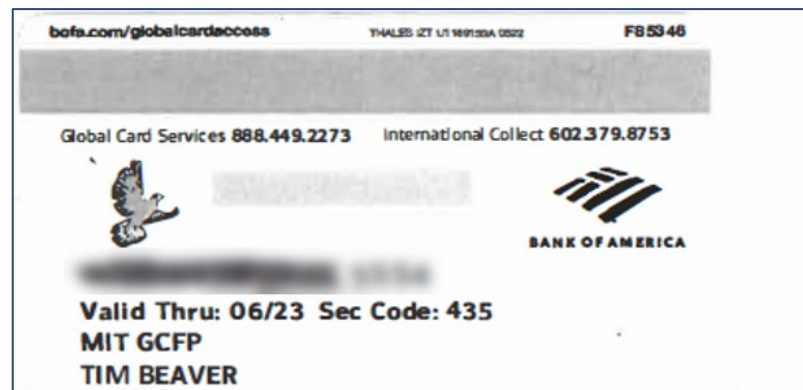
## Individual Travel Card

[Application for Individual Travel Card](#)



## Department Travel Card

[Application for Department Travel Card](#)



# CONCUR BOOKING GUIDELINES



# Concur Booking Guidelines

- Book 14 days in advance whenever possible.
- Check travel terms of sponsored project, if applicable.
- Use **MIT Preferred Suppliers** for air, car, and hotel.
- Use **MIT Travel Card** for easy processing of expenses.



# Concur Booking Guidelines

Partner and Preferred Suppliers include:

## Airlines

- American and One World Alliance partners
- United and Star Alliance partners
- JetBlue
- Singapore Airlines
- Emirates
- Alaska Airlines

## Car Rental Agencies

- Avis
- Budget

View others via **Supplier Search** on the VPF website:  
<https://vpf.mit.edu/suppliers>



# Concur Booking Guidelines

## Local Hotels

- Cambridge Marriott
- Cambridge Center Residence Inn
- Courtyard Marriott Cambridge
- Fairfield Inn Cambridge
- Holiday Inn Express & Suites Cambridge
- Hotel Commonwealth
- Hyatt Regency Cambridge
- Kendall Hotel
- Kimpton Marlowe Hotel
- Le Meridien
- Royal Sonesta
- The Whitney Hotel

## Global Hotels

- Marriott
- Hyatt
- IHG
- And more

<https://vpf.mit.edu/hotel-chain-discounts>

## Travel Agency

- The Travel Collaborative

## Examples of airline savings and advantages by booking Preferred Suppliers

American Airlines	<ul style="list-style-type: none"> <li>• Discounts on most published fares, system-wide</li> <li>• Exclusive pricing up to 75% off – refundable, no change fees, one way on the following city pairs: <ul style="list-style-type: none"> <li>- Boston to/from DCA</li> <li>- Boston to/from LAX</li> <li>- LGA to/from BOS/DCA</li> <li>- Boston to/from SFO</li> </ul> </li> <li>• Flat Fare – Non- Refundable <ul style="list-style-type: none"> <li>- Boston to/from PHL</li> </ul> </li> <li>• Priority Seating - Complimentary Preferred Seats via <a href="https://seatselect.aa.com">seatselect.aa.com</a> allows non-elite travelers to book window and aisle seats locations.</li> <li>• Priority Check in &amp; Boarding – Priority Check in &amp; Group 4 Boarding (same as Gold Customers)</li> <li>• Priority Re-accommodation – Corporate travelers receive higher priority for re-accommodations during irregular operations (e.g., flight cancelations)</li> <li>• Status/Upgrades Match – AAdvantage Gold or Platinum status match. (Share Other Airlines card or statement with travel agent or travel team) then travel on AA/BA/JL to earn next year’s status.</li> <li>• Name Changes – Our preferred travel agents can assist you with name changes on an unused ticket (note – additional fees will apply)</li> <li>• Dedicated Airline Support - Your travel agent has access to dedicated AA/BA/JL support teams</li> </ul>
Cathay Pacific	<ul style="list-style-type: none"> <li>• Discounts ranging from 5-20% on USA-Asia travel</li> <li>• Status Match program</li> </ul>
Emirates Airlines	<ul style="list-style-type: none"> <li>• Boston-Dubai: 5% - 17%</li> <li>• All domestic to all Emirates destinations up to 25%</li> </ul>
JetBlue	<ul style="list-style-type: none"> <li>• Discounts off most published fares</li> <li>• Deeply discounted, fully-refundable and changeable flat fares for the following city pairs: <ul style="list-style-type: none"> <li>Boston – DCA, BWI</li> <li>Boston – ORD*</li> <li>Boston – JFK, Newark, LGA</li> <li>Boston – LAX*</li> <li>Boston – PHL</li> <li>Boston – SFO*</li> </ul> </li> <li>• Free high-speed Wi-Fi and live television</li> <li>• Most legroom of any domestic carrier in coach</li> <li>• Fully transferrable unused tickets (name changes – fees apply)</li> </ul> <p>* includes one checked bag</p>

## Examples of airline savings and advantages by booking Preferred Suppliers

Porter Airlines	<ul style="list-style-type: none"> <li>• 15 – 20% discount Boston – Downtown Toronto and other Canadian destinations</li> <li>• Discounted rates further reduced by any sale/promotional fares</li> </ul>
Cathay Pacific	<ul style="list-style-type: none"> <li>• Discounts ranging from 5-20% on USA-Asia travel</li> <li>• Status Match program</li> </ul>
Emirates Airlines	<ul style="list-style-type: none"> <li>• Boston-Dubai: 5% - 17%</li> <li>• All domestic to all Emirates destinations up to 25%</li> <li>• Complimentary car service to airport with Business and First class bookings</li> </ul>
JetBlue	<ul style="list-style-type: none"> <li>• Discounts off most published fares</li> <li>• Deeply discounted, fully-refundable and changeable flat fares for the following city pairs: <ul style="list-style-type: none"> <li>Boston – DCA, BWI</li> <li>Boston – JFK, LGA, EWR</li> <li>Boston – PHL</li> <li>Boston – ORD*</li> <li>Boston – LAX*</li> <li>Boston – SFO*</li> </ul> </li> <li>* includes one checked bag</li> <li>• Free high-speed Wi-Fi and live television</li> <li>• Most legroom of any domestic carrier in coach</li> <li>• Fully transferrable unused tickets (name changes – fees apply)</li> </ul>
United Airlines	<ul style="list-style-type: none"> <li>• Discounts off most published fares</li> </ul>
Lufthansa	<ul style="list-style-type: none"> <li>• Discounts off most published fares</li> </ul>

## Examples of rail savings and advantages by booking Preferred Suppliers

The AMTRAK logo is displayed in white, bold, sans-serif capital letters within a solid blue rectangular box.

### Discounts apply to Business Class only:

**15%**

- Travel between Boston and Providence, NYC, Newark, Metropark NJ

**20%**

Travel between:

- Boston & Philadelphia, Wilmington, Delaware, Baltimore, BWI, Washington DC
- Providence & Philadelphia, Wilmington, Delaware, Baltimore, BWI, Washington DC
- Washington DC & New Haven, NYC, Newark, and Metropark
- Stamford to/and from Baltimore, BWI, and Washington DC
- NYC & Baltimore, BWI, & Washington DC

Discounts calculated from lowest applicable Acela Express fares, exceptions for some "K" fares

# CONCUR EXPENSE

# GUIDELINES AND DEMO



# Travel Vocabulary - General

- **Sponsored** (Project WBS) vs. **Non-Sponsored** (Internal Order or Cost Center)
- **Out-of-Pocket expense** vs. **Card Transaction**
- **Guest/Departmental Card** vs. **Individual Card**
- **Allowable** vs. **unallowable**
- **Reimbursable** vs. **non-reimbursable**

# Travel Vocabulary -Expense Types

- **Business Meeting Meal** (non-MIT attendees) vs. **Meal** (MIT attendees, e.g., faculty, staff, or student)
- **Per Diem: International** vs. **Domestic**
- **Personal Mileage** vs. **Gas**



# Report Header

Create New Report

Policy

MIT US Expense Policy

Trip Purpose \*

None Selected

Cost Object \*

▼

 Search by Code

Destination \*

▼

 Search by Text

Report Date

09/16/2022

Benefit of Project \*

Non Sponsored Activity

Trip Start Date \*

MM/DD/YYYY

Trip Classification \*

None Selected

Report Name \*

Report Total

Trip End Date \*

MM/DD/YYYY

Comment

Cancel

Create Report

# Airfare Class of Service

MIT travelers may fly only **business** class (or **first** class if business class service is not offered) for:

- All international travel (excluding Canada)
- Domestic and Canada flights where time in-air exceeds 6 hours



# Airfare Class of Service (cont.)

- Travelers must itemize the lowest available coach fare at the time of booking (providing documentation) and the airfare difference. (TTC provides the equivalent coach fare on its itineraries.)
- Unless specifically allowed by the sponsor, the cost of business class/first class may not be charged to sponsored projects. Travelers must allocate the difference to a discretionary cost object.



# Concur Expense

## Business Meetings

- Non-MIT attendees
- The purpose of the meeting or topic of discussion
- A list of attendees (names and affiliation)
- Itemized receipts

## Meals (Breakfast/Lunch/Dinner)

- All attendees must be MIT staff, faculty or students

**Note:** Alcohol must be itemized and charged to a non-sponsored account

# Expense Reporting

Itemized receipts are required for:

- Any expenses that exceed \$75.00
- All business meetings/meals regardless of cost
- All meals with alcohol regardless of cost
- All alcohol purchase regardless of cost

Dos Amigos Restaurant New York, NY	
SALE	
12-12-2014 10:32 AM	
Batch #:04A2A APPR CODE:3A6CE Trace: 9 VISA ****3429	
1 Tacos Del Mal Shrimp	14.98
1 Especial Salad Chicken	12.50
1 Fountain Beverage	1.99
Sub-total: 29.47	
Sales Tax: 2.50	
Total: 31.97	
TIP: _____	
TOTAL: _____	
APPROVED	
THANK YOU	
CUSTOMER COPY	

# Expense Reporting (cont.)

## Missing Receipt Affidavit

If no itemized receipt is available, and an attempt has been made to obtain one, you should:

- Fill out and attach a Missing Receipt Affidavit
- Change the expense type to a “non-recoverable expense”
- Allocate it to a discretionary cost object if under a sponsored project

[https://web.mit.edu/lns/services/Missing\\_Receipt\\_Affidavit\\_0.pdf](https://web.mit.edu/lns/services/Missing_Receipt_Affidavit_0.pdf)

# Project WBS Restrictions

Do not use funds from a sponsored project for the following:

## Trip Purposes

- Fundraising
- Resource development
- Retreats
- Prospective student visits

## Expense Types

- Alcohol
- Gifts
- Upgrade fees or airfare difference
- Entertainment – other
- Non-recoverable expenses
- Misc. promotional expense
- Tips/Gratuities

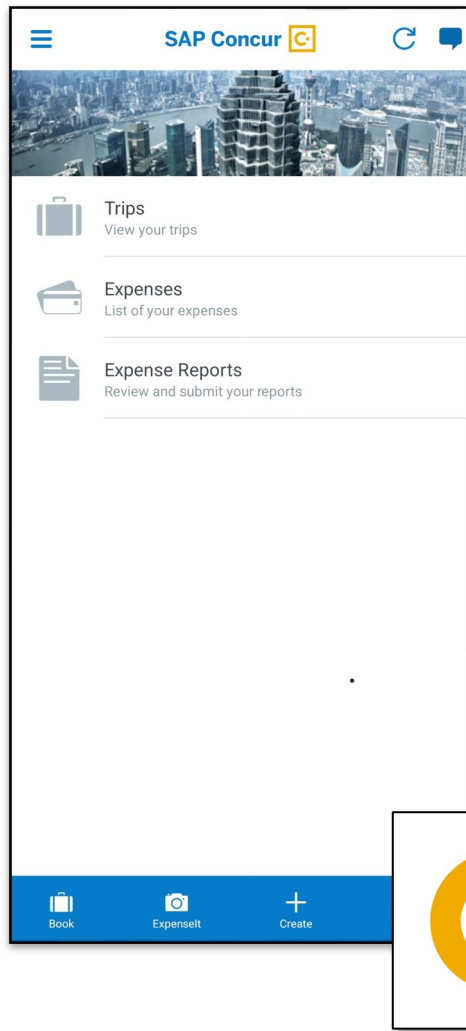
**Written approvals are required for any budget changes.**

# Common Send-Back Reasons

- Missing receipts/missing itemized receipts
- Business/first class airfare or upgrade fees not itemized
- Alcohol not itemized
- Benefit of Project (Report Header)
- Business Meeting/Meal vs. Meal (Expense type)
- Car/travel insurance not allowed
- Personal travel or detours from original destination
- Meals on hotel bill - need confirmation no alcohol included
- Missing comments on miscellaneous expenses - other fee, materials, incidentals



# Concur Apps



- Get travel updates
- Modify itineraries
- Upload receipts

*Remember to keep copies of receipts that exceed \$75 in accordance with the MIT Receipt Retention Policy*


- Concur Mobile now includes Expense IT


***Go to the Apps tab on the Concur homepage to view additional apps.***


# CONCUR DEMO





# Travel Resources


 **VPF** Office of the Vice President for Finance


 **Buying and Paying**

 **Travel Planning and Expensing**

 **Payroll**

 **Budget Management**

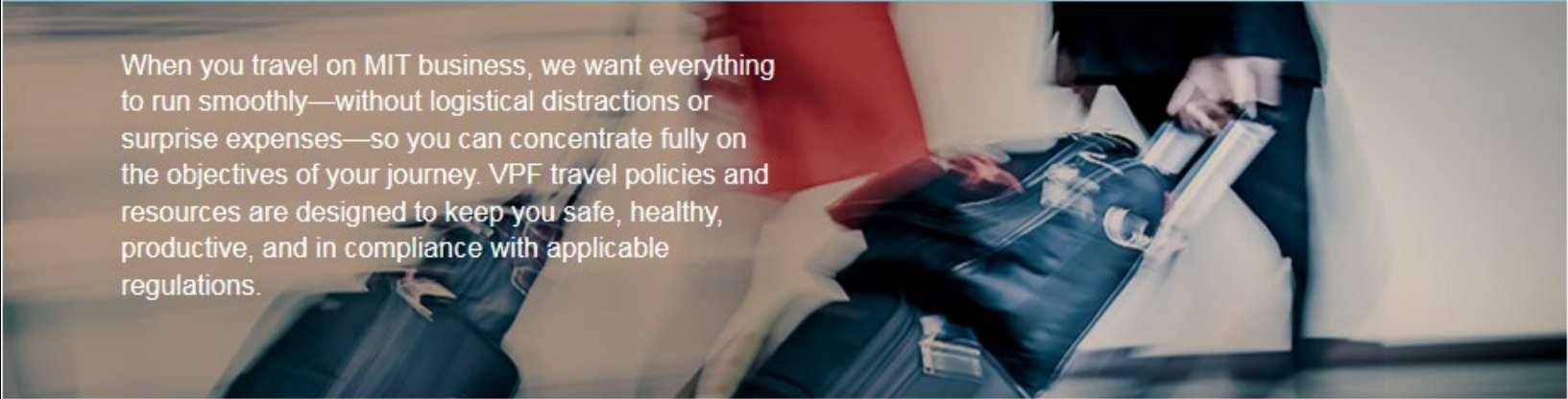
 **Property, Tax, and Accounting**


 **Payments to MIT**

Home

## Travel Planning and Expensing


When you travel on MIT business, we want everything to run smoothly—without logistical distractions or surprise expenses—so you can concentrate fully on the objectives of your journey. VPF travel policies and resources are designed to keep you safe, healthy, productive, and in compliance with applicable regulations.






### Planning Your Trip

Follow these guidelines to ensure that everything goes according to plan.



### While You Are Traveling

Get help, change your itinerary, and access essential information during your trip.



### Expensing Your Trip

Avoid reimbursement delays and costly mistakes with these tips and tools.

<http://vpf.mit.edu/travel-planning-and-expensing>

# Travel Resources

## Email

[travelsupport@mit.edu](mailto:travelsupport@mit.edu)

## VPF Travel and Card Services

<http://vpf.mit.edu/travel>

## Bi-Weekly Drop-In Sessions via Zoom

**Date and time: to be announced**

**The Travel team is available for small group or individual training.**

# Travel Training

[Travel Policies for the Traveler](#) (Online)

[Travel Policies for the Approver](#) (Online)

[ProCard: Cardholder Training](#) (Online)

## In Development

**Concur Overview and Demo (Online)**

# QUESTIONS





# Safe Travels!

