INTRODUCTION TO TRAVEL AND EXPENSE REPORTING

September 23, 2022
Presenters

Katy Featherston
Senior Travel Assistant
VPF Travel & Card Services

Jessica Tam
Strategic Sourcing Analyst, Travel and Hospitality
VPF Strategic Sourcing
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](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 | • Discounts on most published fares, system-wide  
|                   | • Exclusive pricing up to 75% off – refundable, no change fees, one way on the following city pairs:  
|                   |   - Boston to/from DCA  
|                   |   - LGA to/from BOS/DCA  
|                   |   - Boston to/from SFO  
|                   | • Flat Fare – Non-Refundable  
|                   |   - Boston to/from PHL  
|                   | • Priority Seating - Complimentary Preferred Seats via seatselect.aa.com allows non-elite travelers to book window and aisle seats locations.  
|                   | • Priority Check in & Boarding – Priority Check in & Group 4 Boarding (same as Gold Customers)  
|                   | • Priority Re-accommodation – Corporate travelers receive higher priority for re-accommodations during irregular operations (e.g., flight cancelations)  
|                   | • 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.  
|                   | • Name Changes – Our preferred travel agents can assist you with name changes on an unused ticket (note – additional fees will apply)  
|                   | • Dedicated Airline Support - Your travel agent has access to dedicated AA/BA/JL support teams  

| Cathay Pacific | • Discounts ranging from 5-20% on USA-Asia travel  
|               | • Status Match program  

| Emirates Airlines | • Boston-Dubai: 5% - 17%  
|                  | • All domestic to all Emirates destinations up to 25%  

| JetBlue | • Discounts off most published fares  
|        | • Deeply discounted, fully-refundable and changeable flat fares for the following city pairs:  
|        |   - Boston – DCA, BWI  
|        |   - Boston – JKF, Newark, LGA  
|        |   - Boston – PHL  
|        | • Free high-speed Wi-Fi and live television  
|        | • Most legroom of any domestic carrier in coach  
|        | • Fully transferrable unused tickets (name changes – fees apply)  
|        |   - Boston – ORD*  
|        |   - Boston – LAX*  
|        |   - Boston – SFO*  
|        |   * includes one checked bag  

# Examples of airline savings and advantages by booking Preferred Suppliers

<table>
<thead>
<tr>
<th>Airline</th>
<th>Savings and Advantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Porter Airlines</td>
<td>- 15 – 20% discount Boston – Downtown Toronto and other Canadian destinations&lt;br&gt;- Discounted rates further reduced by any sale/promotional fares</td>
</tr>
<tr>
<td>Cathay Pacific</td>
<td>- Discounts ranging from 5-20% on USA-Asia travel&lt;br&gt;- Status Match program</td>
</tr>
<tr>
<td>Emirates Airlines</td>
<td>- Boston-Dubai: 5% - 17%&lt;br&gt;- All domestic to all Emirates destinations up to 25%&lt;br&gt;- Complimentary car service to airport with Business and First class bookings</td>
</tr>
<tr>
<td>JetBlue</td>
<td>- Discounts off most published fares&lt;br&gt;- Deeply discounted, fully-refundable and changeable flat fares for the following city pairs:&lt;br&gt;  - Boston – DCA, BWI  - Boston – ORD*&lt;br&gt;  - Boston – JFK, LGA, EWR  - Boston – LAX*&lt;br&gt;  - Boston – PHL  - Boston – SFO*&lt;br&gt;  * includes one checked bag&lt;br&gt;- Free high-speed Wi-Fi and live television&lt;br&gt;- Most legroom of any domestic carrier in coach&lt;br&gt;- Fully transferrable unused tickets (name changes – fees apply)</td>
</tr>
<tr>
<td>United Airlines</td>
<td>- Discounts off most published fares</td>
</tr>
<tr>
<td>Lufthansa</td>
<td>- Discounts off most published fares</td>
</tr>
</tbody>
</table>
Examples of rail savings and advantages by booking Preferred Suppliers

AMTRAK

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
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy</td>
<td>MIT US Expense Policy</td>
</tr>
<tr>
<td>Report Date</td>
<td>09/16/2022</td>
</tr>
<tr>
<td>Report Name</td>
<td></td>
</tr>
<tr>
<td>Report Total</td>
<td></td>
</tr>
<tr>
<td>Trip Purpose</td>
<td>None Selected</td>
</tr>
<tr>
<td>Benefit of Project</td>
<td>Non Sponsored Activity</td>
</tr>
<tr>
<td>Trip Start Date</td>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>Trip End Date</td>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>Cost Object</td>
<td>Search by Code</td>
</tr>
<tr>
<td>Destination</td>
<td>Search by Text</td>
</tr>
<tr>
<td>Trip Classification</td>
<td>None Selected</td>
</tr>
<tr>
<td>Comment</td>
<td></td>
</tr>
</tbody>
</table>
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
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/Ins/services/Missing_Receipt_Affidavit_0.pdf](https://web.mit.edu/Ins/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.*
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.

Travel Resources

Email
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!