

STEP-BY-STEP TRAVEL PROCEDURES AND GUIDELINES FOR STUDENT TRAVEL

STEP ONE: UNIVERSITY TRAVEL CREDIT CARDS

You must have a university travel card issued to you. If you are on payroll, you will need a CBT travel card. If you are not on payroll (ie: fellowship) you will need a DART travel card.

If you are unsure if you have a travel card, please check with Kelly Ganske - email: kganske@tamu.edu.

To apply for a travel card, contact your respective Program Specialist.

- **A&P Group:** Colleen Leatherman - email: c-leatherman@tamu.edu
- **D&C Group:** Kelly Ganske - email: kganske@tamu.edu
- **M&S Group:** Colleen and Kelly

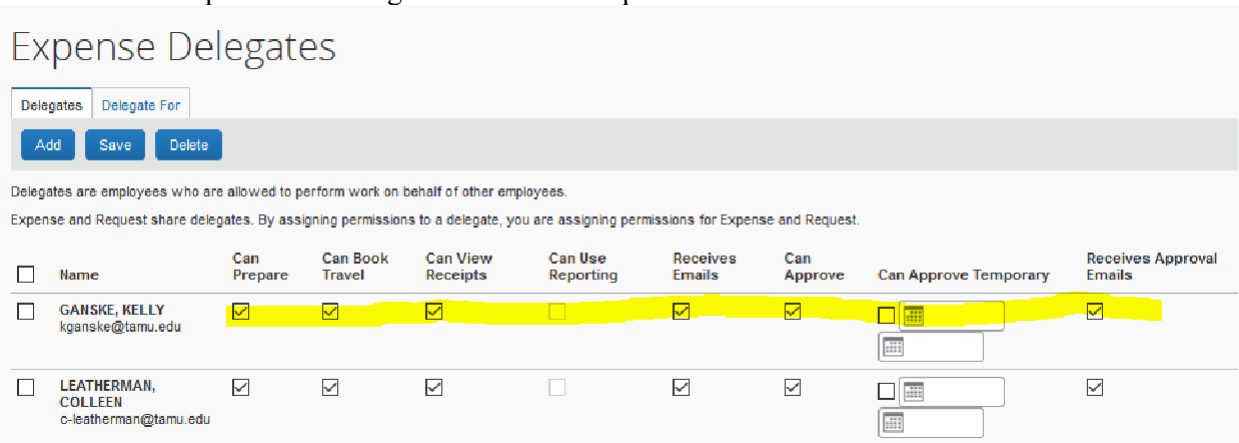
Students will be responsible for their own travel card. Once your travel card arrives, you will be contacted by Kelly Ganske (kganske@tamu.edu) with pickup instructions.

NOTE: The billing address for your credit card is 701 H.R. Bright Building, College Station, TX 77843

STEP TWO: CONCUR - SETTING UP YOUR PROFILE AND DELEGATES

You need to set up your profile in Concur and add delegates. Delegates will ensure the proper submission of your Concur reports, after you have them set up, when you return from travel. Instructions can be found at <https://it.tamus.edu/concur/documentation/userguides/>. To access Concur, you will need to log onto <https://sso.tamus.edu>. When adding delegates, please add Colleen Leatherman and Kelly Ganske in your profile so we can assist you. You can also setup Concur Mobile on your smart phone. A training video can be found at <https://it.tamus.edu/concur/training/>. This will come in handy later to upload receipts.

Below is an example of how delegates should be setup in Concur.



Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	GANSKE, KELLY kganske@tamu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	LEATHERMAN, COLLEEN c-leatherman@tamu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 1: An example of how delegates should be setup in Concur



STEP THREE: PLANNING A TRIP

1. Obtain written permission from your advisor and provide documentation to your respective Program Specialist. You will also need to provide an account number from your advisor that will cover the cost of travel. You will need the system #: 02=TAMU; 28=TEES; the division AERO and the account number xxxxx-xxxxx (example: 28-AERO-55555-00001).
2. Travel cards should be used for all travel related expenses including conference registration.
3. **DO NOT make any airline/hotel/transportation reservations before your trip has been approved. This includes conference registration expenses.**
4. First, you need to fill out a travel leave request form in Concur and submit it for approval. In this form, make sure you include any personal travel dates; the dates should be those from when you leave and return to College Station. For foreign travel, your travel leave request should also include a day-to-day itinerary. For domestic travel, please submit the form as soon as possible, prior to your trip. For foreign travel, we recommend submitting the form 30 days prior to travel, because your request has to be approved by the higher-ups. Your Program Specialist will be able to assist you should you have any questions.
5. Check with your Program Specialist prior to making any reservations as some restrictions apply depending on the account that is paying the expenses.
6. Once your travel leave request has been approved and you have determined what restrictions apply, you may make your reservations. Please send your itinerary for your airline and hotel receipt to your Program Specialist prior to your departure.

NOTE: Concur will let you book first class tickets and expensive hotels. Review your receipt immediately after booking since most reservations can be cancelled within 24 hours. If you select a seat in first class, do **NOT** book it.

- **Air Travel.** You must fly economy. Do not upgrade. It would be best if you booked your air travel in your Concur account.
 - American and United have both contracted with Texas A&M to provide discounted airfare. Discounts will vary based on the route traveled. American will also provide free seat upgrades to Preferred Seating. Contracted rates on both airlines are only available when booking through Concur.
 - If your trip includes personal travel, you will likely need to pay for the airfare personally, not on a travel card, and get reimbursed the comparison fare or actual expense, whichever is less. Your Program Specialist can assist you regarding comparison fares.
 - If your trip is foreign travel, you are required to follow the Fly America Policy (https://tees.tamu.edu/fiscal/_files/_documents/Fly-America-Act-Reservations.pdf).
- **Transportation:** You can book your rental cars through the Concur portal and it will automatically get the state contracted rate. Do not take out additional insurance, neither when reserving the rental car nor when at the destination. Insurance is included in the state contract. If you are doing one-way rentals within Texas, you will need to provide a Motor Vehicle Rental Tax Exemption Certificate located at <https://fmo.tamu.edu/media/64699/Motor-Vehicle-Rental-Exemption-Cert.pdf>.



NOTE: Only book standard size cars. Do not upgrade unless there are 4 or more passengers. Rental car gas must be filled before returning. Do not pre-pay for gas.

- Use Uber/Lyft/Taxis (share rides if possible)
 - Groundshuttle.com - please use this before booking any rental cars to/from College Station to Houston or using a personal vehicle
 - Enterprise - use code: UTS712 - PIN: TAM - www.enterprise.com
 - Hertz - use code: 1705535 - www.hertz.com
 - Avis & Budget - use code: F999712 - www.avis.com
 - Trains/ subways
 - Take advantage of free airport or hotel shuttles
 - Parking Spot - use reservation code: TEXA4028
 - **Keep all receipts.**
 - Using Personal Vehicles - We discourage use of personal vehicles for transportation to/from airport locations. Since you are on official university business it is recommended that you use Groundshuttle.com or car rentals. If more than one person is traveling together, please share transportation.
 - When dropping off a rental at CLL, please do not leave the keys in the car. There is a drop box at the airport. If it's late and the airport is closed you can still access the drop box.
- **Baggage:** Anything over one checked bag needs a justification. Contact your Program Specialist for a justification.
 - **Accommodations:** You can book your hotel through the Concur portal. You may also book directly with the hotel. If the hotel is within Texas, you will need to provide the hotel with a Hotel Occupancy Tax Exemption Certificate located at <https://fmo.tamu.edu/media/64720/texas-hotel-occupancy-exemption.pdf>.
 - Group Travel - two students to a room (male with male or female with female; mixing genders is not allowed). Try to have the hotel split the expenses on each individual travel card whenever possible.
 - You want to book a hotel that has a free cancelation policy.
 - Hotel GSA Rates - To verify your maximum GSA rate before booking, check <https://www.gsa.gov/travel/plan-book/per-diem-rates>. Most hotels offer a state government rate. Please use whenever available.
 - If a room at the conference hotel is available, this can also be booked.
 - Discourage use of AirBNBs unless you can obtain a receipt that has a breakdown of total charges, and if in Texas, the state occupancy tax is removed prior to charging. It is extremely difficult to get taxes removed.
 - **Keep all receipts.** Upon checking out from the hotel, actively ask for a receipt from the front desk if you have not received an online version.
 - **Meals:** Check the GSA rate or your maximum daily meal per diem at <https://www.gsa.gov/travel/plan-book/per-diem-rates>. The first and last day of travel is a reduced rate. At no time will you be able to charge meals in College Station.
 - Tip only up to 20%. Always check the math and do not use the 20% recommendation on some receipts. Some of these are incorrect.
 - **Keep all receipts.**
 - Never pay for anyone else's meal. **ALL** receipts must be split.
 - Alcohol is **NOT** allowed on the travel card. If you are purchasing alcohol, this must be charged on your personal card.



STEP FOUR: INITIATE A TRAVEL EXPENSE REPORT AND UPLOAD RECEIPTS

NOTE: DO NOT SUBMIT THE FINAL EXPENSE REPORT YOURSELF. NOTIFY YOUR PROGRAM SPECIALIST FOR THEM TO REVIEW THE REPORT FOR ERRORS. THEY WILL NOTIFY YOU WHEN IT IS READY TO SUBMIT. REPORTS NEED TO BE SUBMITTED WITHIN 30 DAYS AFTER THE FINAL DATE OF TRAVEL.

1. You may use the ExpenseIt App to upload your receipts. Instruction video at <https://www.youtube.com/watch?v=IWULCvLgh48&feature=youtu.be>.
2. Create an express report in Concur. Instruction video at <https://www.youtube.com/watch?v=bmP5dO09tSQ&feature=youtu.be>.

STEP FIVE: WHAT TO DO IF YOUR TRIP IS CANCELLED

- **Please cancel everything ASAP.**
- Air Travel: Cancel your ticket. You should receive a credit from the airline. Once you receive this credit, forward it to your Program Specialist. This credit will be applied to your next flight.
- Transportation: Please cancel as soon as possible. If there is a charge, please alert your Program Specialist.
- Accommodations: You should be booking hotels with cancellation policies of 24-72 hours before check-in. If there is a charge, please alert your Program Specialist.

If at any time when preparing your trip or during your trip you have questions, please contact your Program Specialist. It's much easier to do it right the first time than to try to correct a situation, especially after submission.

TRAVEL CHECKLIST

- Written approval from advisor and account number provided to your Program Specialist
- Travel leave request form completed in Concur - ask Program Specialist to review before submitting
- Checked with Program Specialist regarding any restrictions on account for travel
- Airline reservation made (preferably in Concur)
- Hotel reservations made (check GSA rate first) - make in Concur or directly with hotel - check the cancellation policy. Print Hotel Occupancy Tax Exemption Certificate, if a Texas hotel.
- Ground Shuttle reservations OR
- Rental Car – booked in Concur – print the Motor Vehicle Rental Tax Exemption Certificate, if rental car is in Texas.
- If using a personal vehicle, did you make parking reservations with Parking Spot (see below for details)?
- Send itinerary for airline/hotel confirmations to the respective Program Specialist.
- Meals - check the GSA rate for the location you are traveling - first and last day is a reduced rate
- All receipts uploaded in ExpenseIt App – save hard copies as well
- Make sure that all the charges on your CBT card have come in on your Concur account and move those charges to the expense report and match your receipts to those expenses
- Complete the expense report in Concur.
- Notify Program Specialist that the report is ready for review.

Parking Discount at the Parking Spot

Texas A&M University has established an agreement with The Parking Spot to provide discounted, and tax-free, airport parking for all Texas A&M employees, as well as employees of all Texas A&M University System members. The discount is 25% off standard retail rates (15% off at Houston IAH). Employees can receive this discount at The Parking Spot for both business and personal travel.

You and your travelers can follow the link to order a Parking Spot card.

<https://www.theparkingspot.com/promotions/corporatehome.aspx?CCode=Texa4028>

You can show your Parking Spot card, your Texas A&M ID, or Texas A&M credit card, to the attendant when paying to receive the discount. You may also use your parking spot account with reservation code TEXA4028 to reserve your spot ahead of time at no charge.

In addition to the discount, employees will receive:

- Spot Club Exec program enrollment to earn free parking points and online account management
- Convenient locations open 24 hours/7 days/365 days a year at Austin, Dallas (DAL & DFW) & Houston (HOU & IAH) airports
- Continuous shuttle service (every 5-7 minutes)
- Free USA Today at check-in
- Complimentary bottled water at check-out
- Prompt and courteous staff
- Pick-up at your car and drop-off at the front door of the airport
- Complimentary luggage assistance
- Safe, well-lit, and fully-fenced facility
- Optional linkage of your Spot Club Exec card to a credit card
- Jump start, tire change, locksmith, and towing service at no charge
- Free Reservations with reservation promotion code: TEXA4028

The Parking Spot also connects directly with Concur. Travelers with the Texas A&M University System who are part of the free Spot Club Exec program can have their airport parking receipts automatically sent to Concur. To connect your Spot Club account to Concur, go to the App Center within the Concur web application. Search for “The Parking Spot.” Then click connect. Once this process is complete your parking spot receipts will automatically be sent to Concur and, if you use your travel card, will attach themselves to the credit card transaction once it’s imported.