# **First steps: As soon as you begin planning to travel**

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| [ ]  [ ]  | If you’d prefer to use a university travel card but do not have one yet, you will need to [submit an application](https://apps.ouhsc.edu/FinancialServices/Account/Login?ReturnUrl=%2FFinancialServices%2F)! You must complete training to get a travel card. If you do not wish to use a travel card, you may use your personal card and seek reimbursement when travel has commenced.For INTERNATIONAL trips: [Complete International Travel registration](https://sso.ou.edu/idp/SSO.saml2?SAMLRequest=fZFRb4IwFIX%2FCum7FKqiNkLC9GEmbhJhe9jLUqCMJtCy3jL03w9kbu7FpG8995zvnrsGVlcNDVtTyiP%2FbDkY61RXEujlw0etllQxEEAlqzlQk9E4fNpTYju00cqoTFXICgG4NkLJjZLQ1lzHXH%2BJjL8c9z4qjWmAYiwMtE2jtLFVa%2FO8xXEp0lRV3JQ2gMKDL8HRIU6Qte1BhGSD5Z9BL7qOirzBcXywB0qCrN3WR%2B%2BOV3jefMbcYjHNZsWCF%2FOVt2TTdEFmPGOrXgbQ8p0Ew6TxEXHIfOKQCXETd0WdZf%2FekBX9LPUgZC7kx%2F0G0lEE9DFJosmI%2Fso1XLB7AQrWAyG9BOubZu%2FbsmudKLju3nWdbTir83MvFyc7UzWG3%2F7W%2BCZmzGzoc%2B%2B720aqEtnZCqtKdRvNmeE%2BchEOxpH%2Fpw%2B%2BAQ%3D%3D&RelayState=cookie%3A1740164888_c131). You will not be permitted to claim ANY expenses for the trip without registering. You must register your trip before you submit a request in Concur. |
|[ ]  For OUT OF STATE and INTERNATIONAL trips: Submit Request for trip in [Concur](https://sso.ou.edu/idp/startSSO.ping?PartnerSpId=https%3A%2F%2Fus.api.concursolutions.com%2Fsaml2) |
|[ ]  Look up the lodging and per diem allowance limits that apply to your trip at [gsa.gov/travel](https://www.gsa.gov/travel/plan-a-trip/per-diem-rates) |
|[ ]  Meals & Incidentals (Per Diem) rate for this trip is: \_\_\_\_\_\_\_. Allowable Lodging rate is: \_\_\_\_\_\_\_\_  |

# **preparations and booking**

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|[ ]  For OUT OF STATE and INTERNATIONAL trips: Book your airfare using [Concur](https://sso.ou.edu/idp/startSSO.ping?PartnerSpId=https%3A%2F%2Fus.api.concursolutions.com%2Fsaml2) or you may contact a [CTP travel agent](https://financialservices.ouhsc.edu/departments/accounts-payable/concur-travel/travel-agency) but fees may apply when using CTP. |
|[ ]  Obtain a Comparable Airfare quote (CAF) if needed due to: Personal travel included in trip, driving rather than flying for out-of-state trips, or booking airfare outside university channels |
|[ ]  Make your lodging reservations, keeping in mind that you may only claim up to the allowable lodging rate, unless your event has official Designated Lodging with a discounted rate for attendees, in which case you may claim up to that rate by staying at the Designated Lodging. Download or take a photo of the designated lodging information in case the host takes it down after the event. |
| [ ]   | Want to confirm you’re within allowable rates or need help obtaining the CAF? Contact SBSC@ou.edu OR your department’s administrative support staff if your department is not supported by SBSC.  |

# **During travel**

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|[ ]  Take pictures of all business-related receipts and upload them in the Concur app or email them to receipts@concur.com (using your OU email) and they will automatically load to your Concur profile.  |
|[ ]  When using local public transportation, generic to/from locations must be provided for each expense (i.e., “hotel to airport”) and tips must not exceed 20% of fare. Transportation for non-business-related reasons such as personal meals or sightseeing is considered a personal expense. |
|[ ]  For research trips without a formal agenda, keep a record of your work-related activities throughout the trip, including research locations and hours. A SBSC Concur Specialist can provide a template for this record upon request (even if your department is not supported by SBSC).  |
|[ ]  Upon checkout from your lodging, be sure to get an itemized receipt or folio showing payment information, nightly rates charged, and a zero-balance due. |

# **Upon your return (if your department is supported by SBSC) \***

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|[ ]  Upload your receipts and other documentation to Concur or your receipts to receipts@concur.com (using your OU email address) or email to SBSC@ou.edu and they will upload for you. |
|[ ]  SBSC will prepare the expense report for you. Please monitor your email for follow-up questions, to ensure your report is processed as quickly as possible. SBSC will notify you when the report is ready to submit. |
|[ ]  Once you submit your expense report, it will go through a series of approval steps. If the report is returned for any reason, please contact your SBSC Concur Specialist to make any requested updates.  |

\**If your department is not supported by SBSC (Shared Business Services Center), please contact the administrative staff support person in your area or refer to the expense report guide located* [*HERE*](https://financialservices.ouhsc.edu/Portals/1354/assets/accounts%20payable/Expense%20Reports%20Guide.pdf?ver=2022-10-12-073656-933)*. For questions about travel policy or Concur functionality email* *travel@ou.edu* *or visit* [*ou.edu/travel*](https://www.ou.edu/travel)*.*