### Assigning Travel and Expense Delegates

Add Coordinator as Travel Arrangers and Expense Approver

**Profile Options**

Select one of the following to customize your user profile.

- **Personal Information**
  - Your home address and emergency contact information.

- **Company Information**
  - Your company name and business address or your remote location address.

- **Credit Card Information**
  - You can store your credit card information here so you don’t have to re-enter it each time you purchase an item or service.

- **E-Receipt Activation**
  - Enable e-receipts to automatically receive electronic receipts from participating vendors.

- **System Settings**
  - Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your weekday start/end?

- **Contact Information**
  - How can we contact you about your travel arrangements?

- **Setup Travel Assistants**
  - You can allow other people within your company to book trips and enter expenses for you.

- **Travel Profile Options**
  - Carrier, Hotel, Rental Car and other travel-related preferences.

- **Expense Delegates**
  - Delegates are employees who are allowed to perform work on behalf of other employees.

- **Concur Mobile Registration**
  - Set up access to Concur on your mobile device
Booking Travel

Send the GGEB coordinator your flight details (price, times, flight number, etc).

- The coordinator needs emailed approval for the expense from the instructor/mentor, so when you ask for approval, CC me.

- If the flight is being paid for by a grant (R01, etc), I will also need a completed and signed A21 form.

- Once I have everything, I will book the flight and send the A21/flight info to the business office for final approval.

- It is helpful if you can provide two flights in case seats fill up before I’m able to get to the request.

- For trains, follow the conference/membership procedures.
Reimbursements, or...

SHUT UP AND GIVE ME MY MONEY!
Reimbursements

To Submit a reimbursement, you will need...

○ Receipts, itemized!
○ Proof of attendance (nametag, program)
○ Expense Report Approval Form if not paying from a grant
○ Statement of Business Connection
○ A21 Form, if your advisor is paying from a grant
○ Patience

All forms can be found on the Resources page of the GGEB website.
Statement of Business Connection

- When filling it out, the date given should reflect the date of travel/conference.
- Include the full name of the conference location, and dates.
- You do not need the business administrator’s signature.
- You also need proof of attendance in the form of a nametag or cover/title page of program and page where your name appears.
- Attach it to the "Receipts" section.
Expense Report Approval Form

- Only reimbursements being paid from non-grant accounts require this.
- The advisor funding the trip should fill it out.
- Attach it to the "Receipts" section in Concur.
A21 Form

- Only reimbursements being paid from non-grant accounts require this.
- The advisor funding the trip should fill it out.
- Attach it to the "Receipts" section in Concur.
Expenses

- Entering expenses is pretty straightforward...
Expenses

- Hotels can be tricky, especially if splitting the bill with another student.
  - Students must book hotels themselves; I cannot do it for you!
  - If sharing the room with another student, ask the hotel to split the receipt when you book.
  - Enter each night as a separate line item. The tax for that night should also be a separate line item.
### Create a New Expense Report

**Report Header**

<table>
<thead>
<tr>
<th>Type of Travel/Reimbursement</th>
<th>Country Code</th>
<th>Report Name</th>
<th>Report Date</th>
<th>Policy</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
<td></td>
<td>05/28/2021</td>
<td>US Expense Policy</td>
</tr>
<tr>
<td>Business Justification</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Test</td>
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<td>CREF</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report Key</th>
<th>School/Center</th>
<th>Funding Source</th>
<th>Program</th>
<th>Notes to Approver</th>
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</thead>
<tbody>
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<td>(40) MED</td>
<td>(400-4009-2-014001) MED-SM-</td>
<td>(0000) NOT PROG REL</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Affiliation</th>
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</thead>
<tbody>
<tr>
<td>Faculty/Staff</td>
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<table>
<thead>
<tr>
<th>Trip Begin Date</th>
<th>Trip End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>08/14/2019</td>
<td>Fixed Meals</td>
</tr>
<tr>
<td>08/14/2019</td>
<td>Hotel</td>
</tr>
<tr>
<td>08/11/2019</td>
<td>Hotel</td>
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<tr>
<td>08/11/2019</td>
<td>Hotel Tax</td>
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<tr>
<td>08/11/2019</td>
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<td>08/12/2019</td>
<td>Hotel</td>
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<td>08/12/2019</td>
<td>Hotel Tax</td>
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<td>Hotel Tax</td>
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<td>Fixed Meals</td>
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<tr>
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<td>Office Supplies</td>
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<tr>
<td>08/06/2019</td>
<td>Train</td>
</tr>
<tr>
<td>03/27/2019</td>
<td>Conference/Registration Fees</td>
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</table>

**TOTAL AMOUNT:** $1,666.89  
**TOTAL APPROVED:** $1,666.89
BGS offers $1,000 in Travel Funds per fiscal year for students to attend conferences and a one-time $1,500 supplement for an off-site class/course. Travel funds only available to students who are presenting. Link to form/instructions is available on GGBE Resources page (forms section). To purchase a flight using travel funds, call World Traveler/Concur with your flight information and list Tiffany Brooks (BGS Business Office Manager) as the travel approver. Once approved, students pay out of pocket and submit for reimbursement after the conference is over.
Conferences/Textbooks/Etc.

- **Get approval from your Advisor to attend conference, purchase textbook, and confirm they will pay**
  - If the advisor is paying from a grant, they need to fill out an A21.
  - Memberships cannot be purchased with grant funds

- **Email me (cc your advisor!) with the following information:**
  - Name of conference
  - Link to registration site
  - Your username and password
  - Total cost, and what you’re registering for (conference, short courses, etc.)
  - If registration requires additional information, fill this out before emailing me. If the website does not save this information, please provide me with the answers.

- **Never pay for conferences/org membership out of pocket!**
Get approval from your Advisor to attend conference, purchase textbook, and confirm they will pay

- If the advisor is paying from a grant, they need to fill out an A21.
- Memberships cannot be purchased with grant funds
- Advisors will have to email me their approval directly. Emails from students telling me their advisor has approved the expense won’t fly with the business office.

Email me (cc your advisor!) with the following information:

- Name of conference
- Link to registration site
- Your username and password
- Total cost, and what you’re registering for (conference, short courses, etc.)
- If registration requires additional information, fill this out before emailing me. If the website does not save this information, please provide me with the answers.

Never pay for conferences/org membership out of pocket!
For train travel, send me your preferred train information. Then follow the procedure for purchasing conference registrations.
Conferences (Cont’d)

- Please try to send me the requested information as soon as possible.
  - I complete the paperwork, but I do not process the payments. Don’t wait until the last minute to send me your request.
  - I will cc you and your advisor when I pass the paperwork along to Joyce.