

TRAVEL & EXPENSE – TIMELINE OF TRAVEL PROCEDURES UPDATES

Updated July 26, 2015

Below are key points to know for the transition from the old paper travel report to the new Concur system:

- Using Colwick Travel to book and charge airfare is no longer available. Travelers should request a University-issued SMU Card or use a personal card to book air after that date.
- If airfare is charged through Colwick Travel prior to June 20, but the trip occurs after June 20 you have two options :
 - (1) Submit two separate reports for the trip:
 - Airfare charged through Colwick Travel is reported using the old paper travel report process to clear the University-paid purchase.
 - Out-of-pocket expenses and expenses on a traveler's University-issued card are reported using Concur.
 - (2) Submit the entire trip via using the old paper travel report process.
- All out-of-pocket expense reimbursements beginning June 20 can reported using Concur, including for trips taken prior to June 20.
- If a traveler holds a University-issued card for travel and their trip overlaps June 20, please contact the Concur travel administrator at x2800 for instructions on how to report travel expenses.

The new SMU Travel Policy goes into effect June 20. Below are key changes to the travel policy. The complete text of the new policy is available on the SMU Travel website at travel.smu.edu.

Approval Process

- Pre-trip approval required by budgetary authority over anticipated funds to be used
- Post-travel approval by budgetary authority over funds used

Method of Payment

- [University-issued SMU Card](#) for SMU travelers or traveler's personal card
- Out-of-pocket expenses or expenses charged to traveler's personal card will be reimbursed after trip is complete

Booking of Travel

- Mandatory use of Concur online booking tool and travel management company for centralized booking of hotel, airfare, and rental car
- Reservations for international travel or travel with multiple destinations/airlines may be booked by contacting the SMU approved travel management company agent

- Exceptions will be made for conference hotel bookings and bookings where there are other savings due to University business relationships that are not available through the travel management company

Settlement of Accounts

- Settlement must occur within 30 days after travel is complete
- Travel advances allowed only for group travel and individual travel with appropriate approval and pre-travel justification

Documentation/Receipts

- Threshold amount for requiring receipt for travel expenses set at \$25
- Receipts will be stored electronically in Concur

Entertainment

- Alcohol purchases reimbursable only if there is an SMU business entertainment purpose

Questions?_email travel@smu.edu

May 21, 2015

New SMU Travel and Expense process begins in 1 month!

SMU's new paperless and more user-friendly online process for booking and reporting travel expenses goes live June 20. Here are key points to know for the transition from our old paper travel report process to the new Concur system:

- **Continue** to book with Colwick Travel and report expenses using the paper travel report process through June 19. Beginning June 20, travel must be booked through the Concur system and our new travel management company Christopherson Business Travel.
- Using Colwick Travel to book and **charge airfare** is no longer available after June 19. Travelers should request a University-issued SMU Card or use a personal card to book air after that date.
- If **airfare** is charged through **Colwick Travel** prior to June 20, but the trip occurs after June 20 – submit two separate reports for the trip:
 - Airfare charged through Colwick Travel is reported using the **old paper travel report process** to clear the University-paid purchase.
 - Out-of-pocket expenses and expenses on a traveler's University-issued card are reported using Concur.
- All **out-of-pocket** expense reimbursements beginning June 20 are reported using Concur, including for trips taken prior to June 20.
- If a traveler holds a **University-issued card** for travel and their **trip overlaps** June 20, please contact the Concur travel administrator at x2800 for instructions on how to report travel expenses.
- Training dates are set for June 8, 9, 18, and 19. Instructions to register for a training session will be announced soon.

Questions? travel@smu.edu or travel.smu.edu

May 11, 2015

New SMU Travel and Expense process begins June 20!

SMU's new paperless – and more user friendly – online system for booking and reporting travel expenses will go live June 20. The go live date has been moved from June 1 to June 20 to coincide with the procurement card billing statement cycle and accommodates fiscal year end processing.

Beginning on that date, SMU faculty and staff will be required to use Christopherson Business Travel within Concur for booking airfare, hotel and rental cars. Training for the new system will be coming soon.

What you need to know:

- Until June 20, use Colwick Travel for booking travel, regardless of travel dates.
- Beginning June 20, before booking, a request for travel must be submitted through Concur and approved by the individual with budgetary authority over the funds being used.
- Required documentation will be submitted and maintained in Concur.
- Questions? Submit them to travel@smu.edu.

A smoother travel process is almost here!

April 15, 2015

Why are we implementing a new travel policy and program?

- **Replace** manual, paper-based process with automated Concur system featuring state-of-the-art functionality (e.g., receipts upload via mobile device).
- **Eliminate** layers of approvals and paperwork.
- Greatly **reduce reimbursement time** for travel expenses.
- **Integrate** travel request, online booking and expense reporting into a single tool
- Enhanced ability to **identify and assist travelers** in the **event of an emergency**.
- **Increased negotiating power** with travel vendors (airlines, hotels, rental car companies, etc.) as all bookings are captured and recognized as SMU spend by vendors.