

Guide for Spending University Money

Travel: (Book through Concur, except for “Conference Rates” for hotels)

- Normally, all hotels, flights, and rental cars must be booked through Concur. You should make sure that Kaila is a delegate (or “travel arranger”) on your Travel Tab in Concur so that she can assist when needed. The instructions are at the end of this document.
- You can book your travel through Concur personally or you can have Kaila book your travel for you. If you would like her to book for you, please send her the flight numbers, hotels (dates, name of hotel, type of room) or rental car information and she will provide you with what she was able to find. If you are booking the travel yourself, please get the p-card number from Kaila.
- However, if you are booking a hotel that has a conference rate that is not available in Concur, that can be booked outside of Concur using the department P-card. Send Kaila the name of the hotel, the dates you will check in and check out, and the type of room you are booking. All hotels can now be booked outside of concur but still have to be on a pcard and require a pre credit auth form I must complete
- If you are traveling internationally, you will need an email approval from Chad Berry attached to your international request in Concur, and the travel request must be approved before travel in order to have any expenses covered. (Kaila will submit International approval forms on your behalf. Just be sure to provide her with all of the information on your travel).
- For any travel-related expense, please send an email to Kaila describing the trip. She needs this information in order to process payment. Please tell her where you went or are going, the purpose of the trip, dates of travel, and whether you are using travel money or commitment money, and a list of expenses you would need to be reimbursed for (e.g. taxis or per diem). For conference travel you will need to include a copy of the conference agenda that states the dates, times and location of the conference.
- Flights must be basic economy and booked **through Concur** UNLESS it is an international flight. International flights can be booked outside of concur but you must be sure that the airline will accept you not having the pcard available. If you upgrade the seat, the upgrade should be paid separately on a personal credit card and is not reimbursable. Baggage charges can usually be covered, if necessary.
- For rental cars make sure the University of Alabama is listed on the rental agreement along with your name. Rental cars must be booked through Concur in order to guarantee UA is on the contract (see section 9.2 of the UA’s travel policy). UA will not reimburse for fuel charges on a rental care receipt, or for toll road charges.

Guide for Spending University Money

Purchases:

- Essentially all purchases outside of meals for out-of-state travel should be made using a P-card (hotel, conference registration, airfare, etc)
- Books must be purchased through a university-issued P-card. Books purchased with faculty cash or personal credit cards will not be reimbursed.
- Ebooks cannot be purchased with a P-card or reimbursed.
- Any purchases from Amazon.com with university money MUST be made by Kaila. We have a business account and are tax exempt.
- Items must be delivered to the Department. They cannot be delivered to your home
- Purchases of software or data must be approved by the Department Chair. Kaila will also need to request approval from the College Software Approver. It of course will also need to be purchased on the P-Card.
- All tech hardware purchases must be run through eTech first. We will get a quote from them based on what you need and then I will proceed with the purchase and get all the appropriate programs installed.

Memberships in Scholarly Organizations

You can only be reimbursed for a membership in a scholarly organization (e.g. APSA or ISA) if you purchase the membership as part of a conference registration and you must be on the program (i.e. as a paper presenter, discussant, panel chair, or other official participant) in order to purchase an association membership as part of a conference registration. Membership and conference registration fees must be paid using the p-card. If you are attending without participating in any way listed above then the membership will need to be at your own expense. Removed red and green highlighted portion.

Purchasing Food with P-card (like when you are taking a guest out for a meal):

- We are tax exempt. Make sure the restaurant knows this before you swipe the p-card. Having tax on the bill can result to a p-card suspension which can lead to further complications
- No alcohol purchases can be charged on the p-card. Please get a separate receipt for alcohol, and the University cannot reimburse for alcohol purchases.
- You can only tip up to 20%
- Please give a list of guests and provide to Kaila in order to reconcile the Concur expense. Expenses for the entertainment of guests should be made on the p-card.
- Get an itemized receipt AND a final receipt. You may have to ask the wait staff for an itemized receipt.
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Guide for Spending University Money

Commitment Funds:

If you are spending money from a commitment fund there are some additional purchasing rules involved with purchases and guest speakers. Please always come to Kaila to discuss options before you spending the money.

Guest Travel/Approval:

Any guests that are invited must be approved before their arrival. Especially if the department or College is going to pay for any expenses including airfare, hotel, or dining. **HOTEL CAPSTONE MAY NOT BE USED AS A HOTEL OPTION WHEN CHARGING A COMMITMENT FUND. MUST BE HAMPTON INN**

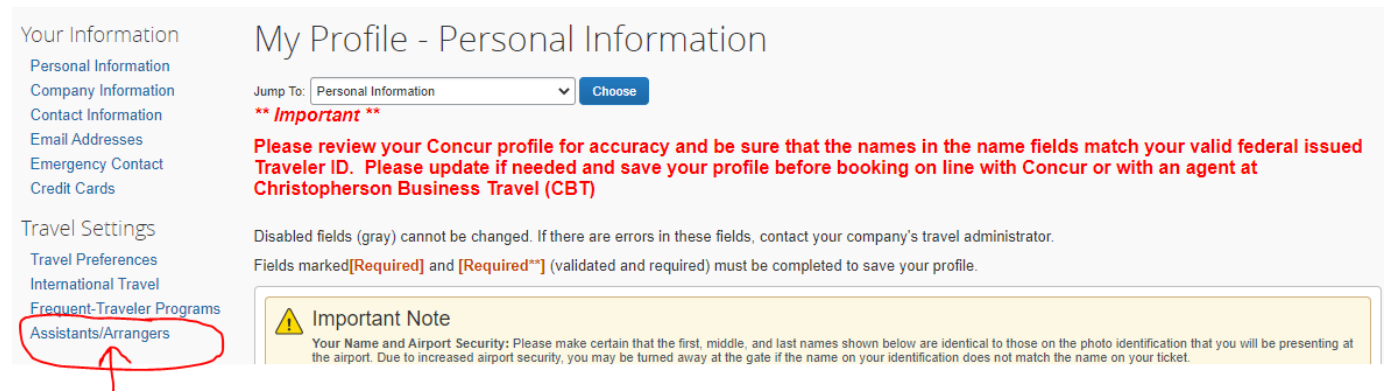
How to Add Kaila as a Travel Arranger on Concur

If you do not see the "Travel" tab when you go into your Concur screen, this means you most likely have not completed the "Travel" portion of Concur training and you will need to do so. Here is a link to the Concur Travel & Expense Training page if you need it: <https://concur.ua.edu/concur-training/#concurtrain>. I know the last thing everyone wants to do is go through another training but it's imperative that you do this if you don't have the Travel tab because I will not be able to make any travel arrangements on your behalf if not.

Here is how to make sure Kaila is a delegate:

Please log in and under your profile complete the following steps:

Go into your profile and click on Assistants/Arrangers under the Travel Settings.



My Profile - Personal Information

Jump To:

**** Important ****

Please review your Concur profile for accuracy and be sure that the names in the name fields match your valid federal issued Traveler ID. Please update if needed and save your profile before booking on line with Concur or with an agent at Christopherson Business Travel (CBT)

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.
Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

It will bring you to this page where you will click on "Add an Assistant"

Guide for Spending University Money

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers

Vail, Jimmy	Can book travel?
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[+ Add an Assistant](#)

Save

Once you click "Add an Assistant" you can type in the last name of an authorized (has completed the necessary training) delegate and that person's information should pre-populate. Select that person as a delegate.

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Bush, Holly L.

Bush, Holly L.
204101 - Dean's Office-Arts and Sciences Adm
hlbush@ua.edu

Bush, Daniel E.
601101 - Football
debush@ua.edu

number in mary

Make sure to check the box for "Can book travel for me" Then hit save. This person will then show up in the list of travel arrangers for the profile.

Guide for Spending University Money

Assistants and Travel ArrangersGo to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

Vail, Jimmy	Can book travel?	
Bush, Holly L.	Can book travel?	

Save

You will need to save and then Concur will direct you back to your profile page. The new delegate should be allowed to now arrange your travel. Please complete this process for all travelers so that Concur travel can be used for future travel arrangements.