***Once you have filled out the travel form, bring it to or send it to your Travel Coordinator**

Your Travel Coordinator -

- AERI-Travel@unt.edu – please email AERI Travel for all your travel
- communication. Your AERI Delegate is Lori Grassman @ LoriGrassman@unt.edu –
- ***Advanced Environmental Research Institute and Institute of Applied Sciences***

Your travel coordinator will assist you in creating a Travel Request in our travel system Concur. For the Travel Coordinator to do that, you need to assign them as a request/expense delegate in Concur. This can be done by accessing your Settings in Concur. More detailed directions can be found on the Travel Website https://finance.untsystem.edu/sites/default/files/concur_travel_request_and_expense_delegate_role.pdf

Once the request is put into the Concur system, **it is the responsibility of the traveler to review the request and submit for approval**, if correct. Monitor request until approved. Follow up with approvers if necessary.

Once the trip is approved, the Travel Coordinator can assist you with registering for the meeting, booking your travel (air, ground, etc.), making hotel reservations, etc.

During travel

While Traveling for a UNT-related event, it is important to keep several things in mind. If you are wanting or expecting a reimbursement for trip expenses incurred, then it is imperative you keep a receipt. Receipts should show with the following:

- Merchant/Vendor Name and Location
- Date of purchase
- Reference to the method of payment (e.g. cash, credit card, etc.)
- Amount of the purchase (including any taxes paid)
- Detailed list of items purchased

In addition, for Meal Receipts:

- Number of people served
  - If <10 people in attendance, must list name on meal receipt corresponding with what they ordered
- Itemized receipt of order (alcohol indicated; cannot be reimbursed)
- Tip amount
- Total Expense amount

For Ground Transportation:

- Merchant/Vendor Name and Location
- Start/End destination
- Date of travel
- Tip Amount
- Total Expense Amount
- Travel purpose (to hotel, to conference, to airport, etc.)

For Lodging:

- Name and Address of Hotel
- Dates of stay (Check-in & Check-out)
- Name of all room Occupants
- Itemized charge breakdown (Room rate, Tax, Service charges, etc.)

For ALL LODGING RECEIPTS that you paid for, $0.00 balance must be shown in order to confirm payment was made and no residual charges are left. *If receipt does not have all necessary information posted, then it will NOT be accepted unless there is supporting documentation containing the rest of the needed information.*

Note: *It is your responsibility to retain all receipts that you personally paid for. Post-travel, please do not expect you Travel Coordinator to obtain receipts on your behalf.* **Without a proper receipt, you run the risk of reimbursements not being approved.**

Post-Trip Expense Report Submission

Once you return from your trip, you must turn over **all travel related expenses** incurred during your travel to your Travel Coordinator. The Travel Coordinator will scan all receipts and any other documents and save them to be uploaded. *It is important to take notice of the currency used in case of exchange rate calculations*. From here, your travel coordinator will create an expense report from your **pre-approved travel request**, which will auto-populate the expenses. Here, they will alter accordingly to match the actual values displayed on receipts. After the correct information has been placed, the receipts providing validation to the report will be attached. Finally, once everything is inserted into the expense report, it is the duty of the traveler to review the details for accuracy. If correct, then submit the expense report. If necessary, follow the report through the approval process. *If something needs to be changed or updated, let your delegate know BEFORE you submit the expense report. After the expense report is submitted, it routes through a chain of approvers.* If the expense report is returned to the user: check the approvers comments on what needs to be changed in order to be granted approval, make said corrections, and resubmit. Any reimbursements due to you will be credited to your bank account of record with UNT.