

Frequently asked questions about the new managed travel program:

1. **Who needs to apply for a T&E card in order to book travel through the online booking tool or travel agent?**

Faculty and staff (including adjunct professors and part time employees), who travel or arrange travel for at least three trips per year, travel overseas, plan group travel, or spend \$6,000 or more on reimbursable entertainment and travel expenses per year, are required to apply for the T&E card. Travelers who do not meet this criteria, but would like a T&E card, may apply for consideration. The launch date is expected to be October 25, please apply for your card accordingly.

Infrequent travelers, who spend less than \$6,000 per year on travel and entertainment, may use their personal card to book travel, but must use the online booking tool or the university's travel agent to qualify for full reimbursement. Your personal credit card will need to be entered in your Concur profile to use the online booking tool.

2. **Guest bookings for Employees**

Question: It's my understanding that we can book for adjuncts or faculty (especially those that don't qualify for cards) and pay for it using one of the support staff's credit card. In this case I understand we are to send the information to the travel agent to book for the employee and to authorize the agent to use our card to pay for the faculty employee.

Answers: Only if the employee doesn't meet the criteria and for some reason they cannot use their personal card to book travel in their own profile and file for reimbursement. In those few instances you can send the guest booking form to an agent to book travel and let them know this is not a guest, but a Tulane employee with a travel profile. The criteria in the policy is a cap with a requirement to get a card, we have no problem issuing cards to employees who don't meet the criteria and paying for travel themselves might be a hardship. All employees who travel abroad, even one trip, will need to apply for a card.

To note, hesitation to give out T&E cards in the past was due to little to no oversight. These purchases will now be monitored and bookings made outside of university policy will be logged for reports at the time of the booking.

Another issue with booking the faculty travel using your card is that card holder will need to send authorizations via fax to every hotel to approve the final charges on your card. This process leaves us open for fraud, because front desk faxes are handled by many different people. If the hotels do not have this authorization, or they simply didn't process your fax, the traveler will be forced to use their personal card to pay the bills and we lose the spend on the T&E card. For car rentals there is no way to send authorization to pay for the traveler in advance. The only way to do that is to set up a direct billing account and currently this doesn't work through Concur, but we are working on a solution for true guest bookings. Usually when we pay for true guests of Tulane it's for local hotels that we work with, so it's not as big of an issue.

3. **If travel is being paid by grants or other funded methods, do those travelers need to use a T&E card and book travel using the online tool or an agent?**

Yes, if you meet the criteria above and your travel/entertainment is reimbursable by Tulane or grant funding, you are required to apply for a T&E card and use the online booking tool or agent.

4. **What about faculty who only receive partial payment for travel, (i.e. a stipend)?**
Faculty who receive a stipend for less than 50% of the travel expenses, may book travel through the Concur Travel online booking tool or an agent using their personal credit cards or book outside of the travel system. If you book outside of the program, you must send your final itinerary to plans@concur.com, which will automatically load your itinerary to your Concur Expense and Travel profile. For this to work, you need to verify your email address in your Concur profile. If traveling internationally, you are required to register your full itinerary with ISOS. Only bookings through the online tool or agent will be automatically registered with ISOS.
5. **Is the use of World Travel Service encouraged, or required, for future travel?** The president's cabinet has decided to mandate the use of the new managed travel program.
6. **If travel is booked through the online booking tool or university travel agency, will the itinerary be automatically registered with International SOS?** Yes.
7. **I have frequent flyer miles and hotel reward points, will I still receive points for my reward programs?** Yes, you simply add those accounts to your Concur Profile when the program goes live. You will accumulate your points as normal and depending on your status, you will be placed on upgrade lists accordingly. Travelers should not incur additional expenses on behalf of the university with the sole purpose of obtaining more rewards (i.e., purchasing more expensive tickets in exchange for higher reward points).
7. **Are we allowed to upgrade our rooms and flights?**
Upgrades may be purchased directly with the airline or hotel using personal payments methods or rewards after the reservations are purchased. Upgrades using rewards miles, credits, or personal payment methods would be considered a personal expense and not reimbursable.

Economy plus or business class seating may be used if the traveler has approval from the School's Dean, Chair, Provost Office or Senior Vice President (or their approved delegate), in writing in advance. Pre-approval is not necessary if at least one of the following conditions are met, including departmental and grant policy restrictions:

- A flight segment has a scheduled in-air flying time in excess of four hours for economy plus and six hours for business class; or
- A medical justification has been documented and approved by the [Office of Disability Services](#); and
- Make sure that your budget and department will allow the upgrade prior to purchase. Your department and grant policy guidelines should always be followed if more restrictive than the travel policy.

When reserving in-policy seating upgrades, only the segment that meets the policy requirements may be upgraded, not the entire itinerary. When booking upgraded class seats by segments, you need to call an agent for the best schedule and pricing, especially if flying international.

Students must travel economy/coach class regardless of duration or length of the flight, unless a request for reasonable accommodations has been reviewed and approved by the [Office of Disability Services](#) that necessitates an upgraded class seat.

8. **Will we be able to book travel for non-employees (visitors, speakers, recruiting, etc.) that Tulane is paying for?**
Yes, there is a guest booking feature. You may book the travel yourself or send the completed guest booking form to an agent to handle for you.
9. **Our department has faculty that are stationed in other countries and travel within those countries to very remote locations. This type of travel is usually supported with grants, sometimes partially by the university. Also, some faculty stay in long term apartments or research facilities, is it required that this type of travel be processed through the online booking tool or travel agency?**
Tulane is requiring that grant travel be book through our new travel management program; however, it's understood that there may be a few exceptions. For instance, faculty/staff residing overseas and who are traveling within the country and in remote areas, would be difficult, at best, to mandate at this time. Communication from these remote areas could be an issue for them, even if they are trying to book travel to the U.S. Whenever possible, this type of travel should be booked through the managed travel program, but it's not required in instances where there is little to no access. The biggest concern here is duty of care and knowing where our travelers are located. Travelers who are not able to book with our agency or the online tool, must make sure that their itineraries are registered with ISOS and sent to plans@concur.com.
10. **What about travel that is already booked (and pre-paid by the staff member) or needs to be booked before the program is launch? Can that be reimbursed through the current appropriate approval process and within concur?**
Until the program is launched on October 25, you will continue to book travel and file your expenses as normal. There will be notifications and training before you will be required to utilize the new managed travel program.
11. **Does ground transportation still go through Tulane's Shuttles & Transportation department or should that be arranged through the new travel agency?**
When booking ground transportation within Louisiana, you will continue to follow the instructions of Tulane's Shuttle and Transportation department. When chartering ground transportation outside of Louisiana, you will make those arrangements through university's travel company, World Travel Services.
12. **What if our department goes over budget due to the extra fees for flights paid to the travel agency?** Tulane's travel management company only charges for ticketed flights, \$4.50 if ticketed through the online booking tool, \$19 if an agent is needed and \$14 per ticket for group booking of 10 or more. The agency does not charge a fee for booking hotels, cars, buses, or trains. Tulane has mandated the use of the managed travel program to provide university-wide benefits, if these fees specifically cause your department to go over budget, report the additional cost to your department head.
13. **If I need to book a flight or hotel that is out of policy, will I be able to do that?**
Yes, there are no hard stops in the booking process. You will be prompted to select a reason for the booking using a drop down menu or you may type your reason in the text box provided.
14. **What happens if I book travel out of policy?**
Tulane will send reports to department heads that will include out-of-policy purchases. If your out-of-policy booking was approved by your supervisor prior to the purchase, no other action is required. Unapproved out-of-policy bookings will be handled at the department level. The main reasons for implementing this program is to leverage the university's spend on travel and enhance the booking and

expensing process. In addition, the travel system will be able to report data that is more comprehensive, allowing the university to negotiate better rates with airlines, hotels and other vendors.

15. Will the booking tool only show the cheapest fares and hotel rates that are in policy?

No, all fares and hotel rates will be available to you, including Southwest and JetBlue. You may search fares and rates by price or by schedule.

16. If we have a good relationship with a local or out of state hotel, can we still work directly with that hotel?

If you currently have discounted rates with a hotel, please share this information with the travel manager and those rates will be entered into the booking system and available to you. You will book your reservations using the booking tool or agent, but may work with your contacts directly on any special needs you may have after the booking is completed.

17. If you are traveling to multiple cities overseas why is it advisable to have the travel agent book the tickets?

Many times an experienced international agent can “break” fares and issue multiple tickets for the exact same or similar itinerary, saving hundreds and sometimes thousands of dollars. There is no online tool that will tell you it’s cheaper to issue multiple tickets. If the itinerary is simple (New Orleans - London and back) the fare will probably be the same online as an agent can get. The best practice is to check with an agent first then book it online if the agent doesn’t find a better price.

18. Can I book group travel with the agent, even locally, that has meeting and catering requirements?

Yes, this is a full-service agency with many years of experience working with group travel, meeting arrangements, leisure tours and other business travel arrangements.

19. I plan programs abroad and often partner with local universities or business contacts that I have worked with for years, do I need to stop working with them?

No, although the agency is well equipped to help with this type of travel, we understand that your international partners are important to the success of your program abroad. If you are using a U.S. based agency for your international travel, you will need to start using World Travel for this service.

20. When we book hotel reservations we use the sales tax exemption form that is on the General Counsel’s website for each particular state and call the hotel to find out what their specific process is for obtaining the sales tax exemption. Is this something that we will still be able to do or will this be done automatically when the new system rolls out?

This will not be automatic, you will have to deal with exemptions as you have done in the past. If you are booking hotels with an agent, you may certainly ask them to help with this process, especially for group bookings.

21. How do I book a ticket for my spouse/companion to travel with me?

If you meet the requirements to apply for a T&E card, you will book your travel using the corporate card and the companion’s travel using a personal card. Since booking through the online tool is only available for faculty and staff, it is best to call a World Travel agent. Please be sure to tell them that you are booking one business trip and one companion trip, but you want them on the same record. There will be a \$19 fee for each air ticket, hotels and rental cars are free of charge. This is the Tulane negotiated fee for an agent assisted tickets. For this fee you get:

- Booking and coordinating the travel for both parties in one phone call.
- Fare monitoring – if the fare decreases more than the applicable airline’s change fee then we automatically reissue for the lower fare.

- Fare discounts – Tulane and World Travel network discounts on air and hotels where applicable.
- Automatic Re-accommodation – If the airlines change their schedule, our agents will work with you and the airlines to get you re-accommodated on an appropriate schedule for your business purpose and coordinate travel arrangements as needed.
- Advocacy – in the event of a service failure on behalf of a supplier, we will work with you and the supplier to reach a resolution.
- Multiple travel options from across all applicable suppliers in one phone call to ensure the best fare and routing for the business purpose.

22. Basic Science research chairs have some concerns with the policy for changes, cancellations, and unused airlines tickets – this statements in particular: “When travel plans change for any reason, the traveler is responsible for notifying the university’s travel agency, World Travel, to apply the unused ticket to the next business trip. If the traveler has no upcoming business trips, **the travel agency will apply the unused ticket on the university’s behalf.**”

Particularly in regards to sponsored 5-L accounts, they are asking for clarification on how this will be handled in the general ledger and grants management system – how will the original account charged will be credited when the unused ticket is applied to another ticket. They are concerned about the possibility that a grant will be charged for a ticket but then that ticket will ultimately be used by another traveler.

Answer: For travel that will be charged to a sponsored award (5-ledger) the general rule is that the air fare should be the least expensive. If a non-refundable ticket is the least expensive, then it is the preferred option. Please note that if non-refundable ticket is purchased and for some reason the ticket is not used, it cannot be charged to the sponsored award since that award did not receive the benefit of the expense. Change fees for tickets purchased may not be charged to a 5-ledger account. Those fees must be charged to one of your department’s unrestricted accounts.

In the case of the ticket being cancelled with no penalties, we would expect the traveler to use the cancelled ticket for the next trip on that grant. If that cannot be done, due to grant rule restrictions or any other reasons, the staff/faculty’s department would absorb the charge of that ticket and the grant funds would be made whole. The cancelled ticket will then be used later for another business trip by that employee. If the employee leaves the university or has no future travel, we would use the unused ticket credit for another employee in that department. The fees and name change rules will vary depending on the airline.

23. **Can I log into Concur from any computer? What is the Concur mobile app?**

Yes, users will access Concur through Gibson portal at <https://gibson.tulane.edu/>.

Concur is also available via the Concur mobile app. The Concur mobile app is linked within the Concur tool, allowing travelers to manage itineraries and expense transactions from their iPhone, iPad, Windows Phone, or Android. The application is free and there are no transaction fees. Key features include:

- Managing of travel itineraries
- Changing air travel dates or times
- Adding or changing reservations for hotels or rental cars
- Arranging for taxis or dining reservations
- Capturing out-of-pocket expenses
- Photographing and uploading receipts
- Integration with the TripIt Pro and ExpenseIt Pro apps

Notes: The TripIt Pro app connects directly to Concur and will notify you of account updates and events that may impact your travel (i.e., flight status alerts, check in reminders, alternate flights, automatic trip sharing, etc.).

The ExpenseIt Pro app is integrated with Concur Mobile to make submitting expenses on the go easier. It analyses receipts and creates expenses directly from receipt images, whereas Concur Mobile is a central place to submit your expense reports and photos of receipts (or approve reports, if you're a manager). ExpenseIt will not add hand written gratuities or delete personally paid expenses from hotel bills when sending to Expense, you may want to use the Concur Mobile app to send those types of receipts.