Frequently Asked Questions

Collected below are the most Frequently Asked Questions for easy reference. If your question isn’t answered here, please email travel@vanderbilt.edu, paymentcards@vanderbilt.edu, or concurexpense@vanderbilt.edu for the most current information.

Why did Vanderbilt implement a new travel policy and program?

Convenience:
- “Soft” policy checks help users stay within guidelines when booking.
- Intuitive user interface (tool) and high-quality in-person assistance (agency) enhance booking experience.
- Proven, in-person agency support in emergencies on the road.
- Automated expense reporting, featuring pre-populated reports and state-of-the-art functionality (e.g., receipts upload via mobile device).

Duty of Care
- Enhanced ability to identify and assist travelers in the event of an emergency.

Intelligence:
- Central data repository of Vanderbilt community travel utilization to better inform management and central travel office.
- Increased negotiating power with travel vendors (airlines, hotels, rental car companies, etc.) as all bookings are captured and recognized as VU spend by vendors.
- Substantially decreases administrative effort and improves internal controls.
- Enhanced fairness among travel community across campus, as non-compliant usage can be easily identified and resolved.

Speed:
- Substantial reduction of pre-travel bureaucracy by eliminating layers of approvals and paperwork.
- Fastest possible disbursement cycle by merit of fully integrating the booking and expense tool and transitioning to e-workflow – target is 4-6 business days.
- Faster, on-the-spot assistance in emergency situations or for special requests while traveling.

PLAN YOUR TRIP

Visit the Vanderbilt travel website vanderbilt.edu/travel for resources on what to do before, during and after you travel. You will find information on free vaccinations, travel documents, an international travel checklist, export compliance and more.

What do I need to know before making travel arrangements?
- Vanderbilt has a travel agency, Corporate Travel Management (CTM), for booking airfare, hotel, and car reservations.
- CTM will work in conjunction with Concur, our online travel booking and expense reporting system to make booking, receipt collection, and expense reporting faster and easier.
- Vanderbilt's travel policy has been integrated into the Concur system.
Will I be able to book my airfare with my PCard?
No. PCard numbers and transactions should never be entered into Concur. All reservations for employee business travel should be booked through CTM or the Concur online system and will be charged to the credit card in the employee’s Concur profile. This credit card will need to be either a personal credit card or a Travel & Entertainment Card (T&E) issued in that employee’s name.

Some hotels and conferences require prepayment by wire transfer in a foreign currency. How do I make those payments? How do I claim those expenses?
If payment can be made online using a credit card, please do so. A traveler requiring payment via foreign currency wire transfer should submit the payment request on a check request form and submit it to the Disbursements office as early as possible. Please do not include these expenses in the Concur reporting system.

**OBTAIN TRAVEL AUTHORIZATION**
Do we still need the green authorization form? What is my travel authorization process?
All employee travel forms, including the green form, have been discontinued. Travelers must still obtain the proper authorization required by their department, division or school before booking travel. Your business officer/finance leader should communicate your department’s internal authorization process.

**BOOK TRAVEL**
Can I still use FROSCH/Orbitz/Expedia/etc… to book travel?
As of July 30, 2013, it is mandatory for all active faculty and staff to use Vanderbilt’s travel agency, CTM, to book business travel. CTM is integrated with the Concur travel and expense tool to provide travelers with best-in-class technology. You may book through CTM via the online Concur tool or by calling an agent for assistance with more complicated travel. CTM is available to solve problems, give professional advice, and make your travel life easier. They provide personalized service via phone or email and support online reservations and newly initiated agent bookings.

Whom do I contact for booking questions or assistance?
CTM provides Vanderbilt faculty and staff with a 24-hour help desk. For agent assistance, contact CTM:
- From in or outside of the U.S., call 866-303-1019
- Email: support@travelctm.com

Who can book in the Concur tool?
This tool is for all active Vanderbilt faculty and staff by logging into the system using their VUnet ID and password. Students and guests of Vanderbilt traveling on Vanderbilt business may have a Vanderbilt faculty or staff member with the Guest Travel Coordinator (GTC) privilege book travel for them. Guests and students who are not U.S. citizens or permanent residents must contact the International Tax Office at ito@Vanderbilt.edu to complete all necessary forms and have possible tax implications evaluated before booking travel.
How do I book a ticket for my spouse/companion to travel with me?
Since booking through the tool is only available for faculty and staff in this instance it is best to call a CTM agent at 866.303.1019. Please be sure to tell them that you are booking one business trip and one companion trip, but you want them in the same record since they are traveling together. This way, he/she can enjoy the same frequent flyer benefits that you do and you can be assured of sitting together. The CTM agent will charge the faculty/staff member's ticket to either a VU T&E card or the personal card (whichever is applicable) and the companion ticket to the personal credit card only. There will be a $29 fee for a domestic personal ticket and $33 for an international ticket. This is the Vanderbilt negotiated fee for an agent assisted ticket. 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 – VU and CTM 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 down line travel arrangements as needed.
- Assistance while traveling – Available 24/7 worldwide.
- 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.

Do I have to use Concur? If I prefer paper, can I still use the Vanderbilt travel forms?
Since July 30, 2013, all Vanderbilt faculty and staff have been required to use the Concur tool for business travel booking, expense reporting and reimbursement. Disbursements no longer processes employee reimbursements on paper forms.

Can I log into Concur from any computer? What is the Concur mobile app?
The first time you log in you must use a computer. At this time, you can download and set up a Concur mobile app. Concur is available via the Web and through mobile applications. Concur’s mobile app is linked within the Concur tool, allowing travelers to manage itineraries and expense transactions from their iPhone, iPad, Blackberry or Android. The application is free and there are no transaction fees. Key features include:

- Managing of travel itineraries
- Changing air travel date or time
- Adding or changing reservations for hotels or rental cars
- Arranging for taxis or dining reservations
- Capturing out-of-pocket expenses
- Photographing and uploading receipts

Do I need to create my own profile?
No, HR uploads a nightly data feed into Concur that “creates” your profile for you. Full time employees and some students that have a “Y” Class job code as their primary position have active profiles in Concur. Employees with active Concur profiles are responsible for completing the information within their profile to enable the booking and expense processes to take place successfully. This includes choosing your travel preferences and reviewing the options and features. This system ensures confidentiality in regards to banking information required to receive direct deposit. Once you have completed your profile, you can assign travel assistants (who can book on your behalf) and expense report delegates (who can create and edit expense reports on your behalf).
Can anyone view/access my bank account information?
No. The Concur site is secure and bank account information cannot be viewed by anyone but the traveler. Your travel assistant can book your travel and charge expenses on your behalf, but they cannot view the bank account information.

I don't have a checking account. How do I get reimbursed?
The Vanderbilt University Credit Union offers checking and savings accounts to faculty and staff. Please visit their website to learn more about the account options they have to offer at http://www.vanderbiltcu.org/index.html or call 615.936.0300. Once your account is established you can enter your new banking information into Concur.

What is an e-receipt?
It is the electronic version of your receipt – delivered straight from the supplier – that uploads easily into your expense report. Please check your Concur profile to ensure that you have enabled e-receipts.

What is the Receipt Store?
The receipt store is where you can store receipts by uploading them into one place. You may then attach the receipt to your expense report by using this option.

What are travel assistants and expense delegates?
Travel assistants will be able to make travel reservations on your behalf once your profile is completed and you have assigned them in this role. Expense delegates, once assigned by you, can assist in creating and editing your expense reports.

Will Southwest Airlines fares show up in Concur?
Southwest Airlines has joined with Concur to offer access to SWABIZ, Southwest Airlines’ business travel reservation Web page.

Will I still receive my mileage points as a frequent flyer for all my airline travel?
Your Concur profile includes a section for Frequent Traveler Programs i.e. frequent flyer numbers or other similar travel rewards programs for car rental and hotels. Reservations and purchases you make through CTM/Concur will be linked to the information in your profile.

Can I book international reservations online?
You may book international travel in Concur, but it is recommended that all complex international travel (i.e. more than two legs), be booked by calling a CTM agent, who can check for best trip routine, airline rates, provide options, and ensure you have proper travel documentation. CTM can be reached at 866-303-1019.

What if I have two or more travelers going to the same destination?
Concur has a great feature for this—trip cloning. This feature allows a travel arranger to easily make multiple reservations for one trip. The travel assistant makes the first reservation and then “clones” the remaining reservations without having to repeat every step of the booking process multiple times.
I frequently travel to the same city with same hotel and same car. Is there a way to mark this trip for reuse?
You can create a template for any trip for future reference.

How do I pay for my airfare? How will I receive my tickets?
All reservations for employee business travel should be booked through CTM or the Concur online system and will be charged to the credit card in the employee’s Concur profile. This credit card will need to be either a personal credit card or a Travel & Entertainment Card (T&E) issued in that employee’s name. The airline you have booked with will send you e-tickets and an email with your payment confirmation.

How do I reserve a car or hotel?
You can make all your reservations at the same time in the Concur system on the “Travel” tab or you can go back and add reservations at any time. You will need your personal credit card to reserve a hotel or car rental. Please do NOT use a PCard for Concur expenses.

What do I do if the conference I am attending has a special conference or hotel rate?
You may still book these directly through the conference organization to take advantage of the discount and rooms reserved by that conference’s housing bureau reserved room blocks.

I am flying into one airport but need my car/hotel in a different location. How do I do this?
Continue through the Concur tool as if you are just doing an air-only trip. Do not choose a car or hotel while filling in your cities and dates on the main page. Upon reserving your flight, you will be presented with the Travel Details page, where you will have the option to Add Car/Add Hotel, Cancel Car/Cancel Hotel, and designate the city of pick up in the travel booking tool.

Can we still use a PCard to pay for registrations?
Please use your personal credit card to pay for registration fees and submit for immediate reimbursement. T&E cards can be used to pay some registrations depending on the host. Please check the T&E FAQ document for a listing of appropriate purchase types. Reimbursement funds should be in your bank account within days of being approved. If this is not an option, then the registration fees could be paid by wire transfer, check through Disbursements or on a PCard. Please note, if a PCard is used, it must be allocated through US Bank’s Access Online and not submitted through Concur.

How do I view my itinerary?
Concur will send your itinerary to the email address listed in your profile immediately after you confirm the trip. You will receive an email with your final itinerary once the ticket is issued. You can also view your itinerary in Concur. In addition, you can download TripitPro and organize trip details into one master online itinerary — even if arrangements are booked at multiple travel sites.

Does the Concur system know the VU travel policy?
Concur has been built to assist you in complying with Vanderbilt’s travel policy during booking and expense reporting. The system has built-in popups, requirements, and stops to assist in complying with Vanderbilt policy and IRS regulations.
How do I utilize unused tickets?
When a reservation on which non-refundable tickets have been issued needs to be cancelled, the traveler or travel assistant must call a CTM agent at 866-303-1019 to cancel the reservation. The airline ticket becomes a credit on file within the Concur tool and the CTM profile for that traveler. Every airline is different on how they allow unused tickets to be reused for future travel but in general, the unused ticket cannot be transferred to another person, must be used (traveled on) within a year from the date of issue and will incur some sort of penalty (except for Southwest) at time of ticketing for the new ticket. The traveler should contact CTM to utilize the unused tickets. Southwest credits will appear in the section below where the ticket credits for the other airlines appear. Southwest credits can be applied to ticketing in Concur. There are always special circumstances surrounding cancellations and ticket reuse.

REPORT EXPENSES

Can I request mileage reimbursement in Concur?
The Concur tool can reimburse mileage using different rates. Most travelers should use the IRS rate. The state rate should only be used when it is being charged to a state-funded grant.

If an employee pays for a future expense (airfare, hotel, etc.) with their personal credit card, can they get reimbursed now or do they have to wait until after the conference?
Once the transaction is complete and a receipt is available, they may complete an expense report in Concur and be reimbursed as long as it is not being funded by a Federal grant source.

How do I submit receipts?
If your profile has been set up to include e-receipts, some receipts may upload automatically for you. Other receipts can be electronically attached to your expense report either by uploading scanned images to the Concur system from a computer or mobile app or by faxing them to a dedicated Concur fax line. The receipts are immediately viewable in the system upon faxing or uploading. Receipts should then be attached at each line item expense.

What receipts are required? What do receipts need to show?
Vanderbilt travel policy requires a receipt for expenses $25 or greater. Receipts should be the original itemized receipts that show vendor information, purchase details and method of payment. Please contact your department business officer/finance leader to see if your department/division/school has stricter guidelines in place. If you have lost a receipt, the system has the option to submit a missing receipt affidavit in its place. This can be completed ONLY by the traveler before the expense report is submitted.
What should I do with my original receipts after they have been faxed or scanned to Concur?
All originals should be kept until reimbursements have been received. Although not required, we recommend that any paper receipts be kept for one month for audit purposes. After this period, they should be shredded. Please remember, that any receipt reimbursed by Vanderbilt as a business expense cannot be submitted on your personal taxes as a business expense.

If there are multiple travelers and one person pays for the entire meal, how is this reported/reimbursed?
This type of expense would be considered a business meal with attendees. The expense type “Business Meal” would be selected, and the attendees’ names should be added within the tool using the attendees function. The expense report approver would need to verify that only one traveler has claimed the expense for all attendees.

How do you separate alcohol on the receipt once it is scanned?
Any receipt can be itemized to extract personal or alcohol purchases to the appropriate expense types.

Who will review and approve my expenses?
An expense report approver will be reviewing and approving each traveler’s expenses. Faculty and staff are responsible and accountable for the appropriateness and accuracy of expenses they submit. An expense report approver should hold a higher position than the traveler holds and/or be an appropriate approver for the center being charged. Expense reports require one approval. However, all reports are subject to additional review and audit, both internal and external, for compliance with Vanderbilt policy, federal grant requirements and IRS regulations.

How long does it take to be reimbursed after an expense report has been approved?
Reimbursements for expense reports that are complete and follow all audit guidelines should be deposited to the traveler’s account within 3-5 from the date the report is final approved. An email from Concur will be sent to notify you.

How do I process reimbursements for my house hunting and moving expenses?
These expenses can be submitted for reimbursement through the Concur tool.

Why do some center number allocations show in the report PDF and others do not?
The allocations are at the itemization line level, not at the main expense level for expenses such as hotel. When you go into Concur to print an expense report, (Print/Email drop down -> click on Vanderbilt Detailed Report), the pop up window will display the expense report in main expense level format. To view all allocations within the expense report, you must click on the “Show Itemizations” at the top left corner of the report (see the second screenshot below). Once you select the “Show Itemizations”, the report will automatically refresh to display all transactions with itemizations.
GENERAL FAQs

What if my trip is canceled after airfare is booked? How are unused tickets tracked/used?
Unused tickets will appear in your Concur profile. Each time you make an airline reservation, Concur will automatically check to see if your unused ticket can be used towards the purchase of your new airline ticket. CTM will make all attempts to utilize unused tickets.

Can the system be used to book personal travel?
No. The Concur online booking tool should never be used for personal travel.

Is my credit card information secure?
Concur holds liability for the security of credit cards and all personal information stored in its system. The process of providing credit card information to Concur mirrors that for airlines, hotels, online travel vendors like Orbitz and Hotwire, and retailers such as Amazon. This data is required for booking hotel and transportation arrangements. All data is immediately encrypted when transmitted and subsequently stored on Concur systems. Concur meets international security standards for the privacy and safeguarding of data and will investigate and resolve individual complaints or disputes. Like credit card information, Concur holds liability for the security of all personal bank account information. The security standards surrounding the privacy and safeguarding of data described above also apply to personal bank account information. Only the last 4 digits of the routing number and bank account number will be shown to you upon saving. No other person will be able to view any part of your banking information.

- Concur services over 10,000 clients located in more than 90 countries
- Concur processes 28 million transactions worth over $35 billion in T&E spend a year
- Over 10 percent of the U.S.’s T&E spend is processed by Concur solutions
- More than half of the Fortune 500 are Concur clients, including 7 of the top 10 U.S. companies
- Over 60 percent of Business Travel News’ Corporate Travel 100 are Concur clients
- Concur meets international security standards for the safeguarding of data and is proactively subjected to a number of globally recognized standards, including:
  o ISO27001 (BS7799 certified since 2004)
  o ISO20000
  o SAS70 (within the US)
  o Sarbanes-Oxley (SOX) compliance (within the US)
  o VISA registered CISP Compliant Service Provider Level II
- Concur only collects the minimum personal data that is necessary. Personal data is never used for marketing and is only transmitted to third parties when there is a specific requirement for an agreed business service. All data is encrypted when transmitted and subsequently stored on Concur systems.