Preparing for travel

- Utilize the Caltech Travel site
  - [http://procurement.caltech.edu/departments/cardquest/travel/traveling1](http://procurement.caltech.edu/departments/cardquest/travel/traveling1)
Traveling

Travel Planning

University business travel requires considerable planning to ensure the best experience during the trip and after when reconciling expenses. Be sure to check with your department to determine the requirements necessary to initiate your travel arrangements (e.g. specific approval requirements, university procurement options, etc.).

Dependent upon your department, you may be required to compile a list of expenses and their estimated costs.

Travel Policy

To ensure efficiency and fiscal responsibility, be sure to refer to Caltech’s Travel Policy prior to departure and before extending institute/personal funds for travel related expenses.

Pre-Departure Checklist

1. Review Caltech’s Travel Policy    2. Purchase airfare in advance, check with your division administrator for funding guidelines    3. Reserve ground transportation (e.g. rental car)    4. Reserve hotel    5. Check airline baggage/boarding rules    6. Check travel advisories for destination    7. Check Export Control requirements: Check with property management before transporting any equipment.    8. Arrange financial options    9. Obtain appropriate immunizations    10. Acquire applicable travel identification (e.g. passport/visa)    11. Confirm necessary insurance coverage (e.g. medical)    12. Check your flight status before departure    13. Share itinerary/travel details with department/family/friend

NOTE: The pre-departure checklist is a general list and is not inclusive of all items necessary for travel to your business destination. Consult your airline, travel agency, host or other travel resources to ensure all basic requirements are covered.
What To Take With You

**Identification**
REAL ID act
Read more...

**Safety, Emergency Contact list and Communication**
Read more...

**Baggage, Equipment & What to Pack?**
Read more...

**Travel Expenses, Money & Financial Resources**
Bring multiple forms of money, including traveler’s checks, ATM cards, credit cards, and cash. Do not rely on a single means of accessing funds.
Read more...

**Health & Medical Insurance Card**
Carry your insurance card and important medical information about any significant health issues in the event of an emergency.
Read more...

**When you return home**
Read more...

Need some assistance booking your travel? Call Corporate Travel Planner’s Full Service Agent Assist and speak to our knowledgeable Travel Consultants.

(844) 688.7601 (toll free)
M-F | 8am-5pm PST

Need Online Assistance? We Can Help.
(877)727.5188 (toll free)
M-F | 8am-5pm PST

For More Information Contact Travel Services at TravelStaff@caltech.edu
Foreign travel

• Check the U.S. State Dept. site for passport info and travel advisories.
  – travel.state.gov
Foreign travel

• Utilize (fee services) for passport/visas
  – CTP has an in-house person.
  – Omega Passport Services
    331 N. Brand Blvd, Glendale, CA 91203
    Call (818) 545-0000 and ask for “Jill.”
  – Mania’s Passport & Visa Services: maniaspassportandvisa.com
  – VisaHQ: visahq.com

• EAS Division confirms we can pay for fee services on faculty discretionary funds.
<table>
<thead>
<tr>
<th></th>
<th>Economy/Coach</th>
<th>Coach Plus</th>
<th>Business Class</th>
<th>First Class</th>
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<tbody>
<tr>
<td><strong>Domestic Travel</strong></td>
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<tr>
<td>Federal Grants</td>
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<td>Allowed only with prior approval</td>
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<td>Highly Discouraged Allowed only with prior approval</td>
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</table>
Exceptions

- Upgrades above Coach/Economy are allowed only if: coach would require circuitous routing; coach would require travel during unreasonable hours; coach would excessively prolong travel, coach would result in increased cost that would offset transportation savings; coach is not reasonably adequate for the physical or medical needs of the traveler; coach is not reasonably available to meet mission requirements.

When approval is required, the justification must be appropriately and properly documented. Approval will hinge on meeting at least one of the exceptions described above. Send (via email) requests for approval with backup documentation to the EAS Division Administrator for consideration by the EAS Chair. Note that prior approval is required in some cases.

Some awards (federal and non-federal) strictly prohibit business and first class travel. This requirement supersedes Caltech's policy.
Tools & tips to make documentation and receipts easier
So you need documentation

- Upgrades
- Personal Travel
- Traveling with Family
- Other
Take some screenshots

• Train personnel to take screenshots at the time of purchase.
• Show what the fare would have been if they had just traveled for the days of the conference at the allowed fare level.
Print Screen (or PrtScn)

- This copies your entire screen (or screens) to the clipboard.
- You can paste it into Word, crop the image, and save as a PDF.
- Pro: You can show open menus or other information that requires you to click or hover.
- Con: Shows your *entire* screen. You will need to crop the image unless…
  - Copy screenshot of single window: **Alt + PrtScn**
Save via Print Screen

• Windows now allows you to save screenshots as images instead of just copying them.
  – Save full screen screenshot: **Windows Key + PrtScn**
  – Save screenshot of single window: **Windows Key + Alt + PrtScn**
  – These will appear in *Pictures > Screenshots* folder.

• Dropbox likewise allows you to save screenshots.
  – **PrtScn** (full screen) or **Alt + PrtScn** (single window)

• You may need photo editing software (like Photoshop or Gimp) to crop it.
Snipping Tool

• This tool copies only the portion of the screen you want it to.
• In the current version of Windows (not 7), there are special features like a timed delay and annotation.
Firefox

• If you use Firefox, there is a built-in screenshot feature that is similar to the Snipping Tool but a little easier.
Currency Converter

Currency I Have: Chinese Yuan Renminbi (CNY)  
AMOUNT: 8,000

Currency I Want: US Dollar (USD)  
AMOUNT: 1,155.67

Want to transfer money? Try our Money Transfer service
INTERBANK, %  DATE: Oct 15, 2018  
HELP

Personal Money Transfer
Corporate FX Payments
Automated Rates API
Historical Currency Converter

SEND MONEY WITH TRANSFERWISE
REQUEST A QUOTE
LEARN MORE
VIEW HISTORICAL DATA

CNY/USD Details
CNY/USD for the 24-hour period ending Sunday, Oct 14, 2018 22:00 UTC @ 4.10-

Selling 8,000.00 CNY → you get 1,155.67 USD
Buying 8,000.00 CNY → you pay 1,156.52 USD

Your capital is at risk. Losses can exceed investment. Leverage trading is high risk and not for everyone.
Currency Converter

Currency I Have: Chinese Yuan Renminbi (CNY)
AMOUNT: 8,000

Currency I Want: US Dollar (USD)
AMOUNT: 1,155.67

Want to transfer money? Try out Money Transfer service

Personal Money Transfer
Corporate FX Payments
Automated Rate API
VIEW HISTORICAL DATA

CNY/USD Details
CNY/USD for the 24-hour period ending Sunday, Oct 14, 2018 02:00 UTC @ - 5%
Selling 8,000.00 CNY → you get 1,155.67 USD
Buying 8,000.00 CNY → you pay 1,156.52 USD

Your capital is at risk. Losses can exceed investment. Leverage trading is high risk and not for everyone.
More resources

• zapier.com/blog/best-screen-capture-tool/
Verify your email address

• This allows you to forward receipts directly into CardQuest.

• If there is an attachment, CardQuest will ignore the email and make the attachment a receipt.

• If there isn’t a receipt, CardQuest will turn the email itself into a receipt.

• Just forward to receipts@concur.com.
Please add at least one email address.

- How do I add an email address?
- Travel Arrangers / Delegates
- Why should I verify my email address?
- How do I verify my email address?

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Verification Status</th>
<th>Verify</th>
<th>Contact?</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Verified</td>
<td>Disable Verification</td>
<td>Yes</td>
<td><img src="https://www.concursolutions.com/profile/personalprofile.asp?&amp;EMailAddresses" alt="Add an email address" /></td>
</tr>
<tr>
<td>@yahoo.com</td>
<td>Verified</td>
<td>Disable Verification</td>
<td>No</td>
<td><img src="https://www.concursolutions.com/profile/personalprofile.asp?&amp;EMailAddresses" alt="Add an email address" /></td>
</tr>
<tr>
<td>@gmail.com</td>
<td>Check email for code</td>
<td>Resend</td>
<td>Cancel</td>
<td>No</td>
</tr>
</tbody>
</table>

Enter Code: [OK]
Verify your professors’ email addresses

• If you have access to their profiles in CardQuest, you can generate the verification codes. You will just need them to forward the verification code to you.

• Once their email is verified, you can forward receipts on their behalf.

• Just forward to receipts@concur.com and change the subject line to their email address.
Quick Steps

• In Microsoft Outlook, use Quick Steps to avoid retyping the email addresses.
• Find Quick Steps on the Home tab. Go to Manage Quick Steps > New > Custom.
  – Name the Quick Step.
  – Select Action: Forward.
  – Enter receipts@concur.com in the To: field and click “Show Options.”
  – Change the Subject: field to the verified email address of the Concur profile where you want the receipt to appear.
Sign up for e-receipts

• More and more companies (airlines, hotels, etc.) provide electronic receipts that automatically appear in CardQuest.
Sign up for e-receipts

• Personnel must opt in. (Faculty will need to log in and agree to the terms.)

• Click profile settings. Under other settings, select E-Receipt Activation. Then the user agreement will appear, follow instructions and complete.
Use the Concur mobile app

- Manage trips.
- Book taxis, hotel, rail, and rental cars.
- Take photos of receipts on the go.
- ExpenseIt – Analyzes receipts and automatically creates a line item.