

CBIS-Related Travel Instructions

In order to be reimbursed for CBIS-related travel expenses, students/employees will need to submit an expense report in Concur.

1. Booking Travel:

RPI's travel agency is Direct Travel: cttravel@dt.com (phone # 866-495-9839). Travelers can book their travel via Concur ([concursolutions.com](http://concur.com)) or call Direct Travel for assistance. Concur can be also used to make reservations for your travels and complete expense reports for the trip. If you book a trip with a travel agent, the itinerary or reservations will still be imported into your Concur account.

2. Setting up your Concur account–

In order to submit an expense report, travelers will need their own Concur account. To create an account, you will need to complete the following documents:

- **Concur Travel and Expense Set-up Checklist**
- **Concur Authorization Form**
- **Concur Direct Deposit Authorization Form**– must have Direct Deposit set up for payroll to have travel reimbursement direct deposit.

You can find these documents on the RPI Travel & Expenses web page:

<http://finance.rpi.edu/update.do?catcenterkey=179>.

If you are having difficulty establishing your Concur account or are experiencing other technical difficulties, please contact the Travel & Expense office: Travel-Expense_Support@rpi.edu

3. Concur Training–

For detailed instructions on how to navigate the Concur software, video training modules are available for training. The modules can be found here: <http://finance.rpi.edu/update.do?catcenterkey=217>

4. Pre-Travel Approval Form–

Travelers must complete and submit this form for approval prior to any CBIS-related travel. Forms should be signed by your PI and sent to the financial manager. This form will need to be attached to the expense report after the trip is completed. Submitting an expense report without a completed pre-travel approval form may lead to slower reimbursement times. The form can be found on the CBIS website: <http://biotech.rpi.edu/contact/administration>

5. Key Travel Guidelines–

After a trip is completed the travel expense report in Concur needs to be submitted. All expenses greater than \$35.00 require a receipt. Meals need a detail receipt listing the items. Alcoholic beverages are not allowable on sponsored research funds and will not be reimbursed.

If you have any other questions related to travel or other expenses, please contact your CBIS Business Coordinator.