

**Objective:** This section will go over the steps to create and submit travel documentations and reservations when hosting a visitor for PPPL travel.

## Travel Request

Non-PPPL employees do not have access to PPPL's Concur system. Follow the steps below when a PPPL employee (host) has a business need to host/sponsor a visitor or non-PPPL employee's travel, such as:

- Interview travel,
  - Relocation travel,
  - Visitor travel,
  - Student travel, etc.,
1. The host, or the host's admin (if delegated) sends an email to the Travel Office with the following information:
    - Traveler's First Name
    - Traveler's Last Name
    - Name of the Delegate (PPPL employee who will be responsible for:
      - Completing the traveler's profile,
      - Completing and submitting the travel request,
      - Booking travel arrangements or notifying the traveler when they can book,
      - Completing and submitting the travel expense.)
  2. Travel Office notifies the Delegate with a copy to the host (if different) that a visitor profile has been created for the traveler, and provides all pertinent information.
  3. The host / delegate is responsible for obtaining the following information from the visitor in order to set up the travel profile in Concur (not required for trip request)
    - Gender
    - Date of Birth - considered PII and should be obtained over the phone or through PU Secure Email Portal
    - Mobile Phone Number
  4. Host/delegate enters trip request in Concur and submits on behalf of the visitor, and waits for an approval.
    - The delegate should email [accounts\\_payable@pppl.gov](mailto:accounts_payable@pppl.gov) to provide the visitor's email address at this time. This will allow Accounting to work with the visitor in order to have them set up in PU's Supplier Management System, which will ultimately expedite their reimbursement after their expense report is processed.
  5. Once the vendor ID is set up, Accounts Payable will update the Vendor ID field in visitor's Concur profile.
  6. Once the trip is approved, the delegate will receive an email notification, and can proceed to book the travel arrangements.

## Travel booking for visitor

When booking travel arrangements for a PPPL visitor, the Travel Office recommends the delegate to contact Graycar Travel directly. The delegate can also make the reservations in Concur while delegated into the visitor's profile.

### Air / Amtrak train

- Airfare / Amtrak train fare will be direct billed to PPPL's corporate card when booking in Concur / with Graycar Travel.

### Lodging

- A credit card number is required when reserving a hotel. If PPPL is paying for the visitor's lodging expenses, the Departmental Admin must provide his/her PPPL Travel Card to guarantee the visitor's lodging reservation.
- PPPL has direct billing agreement with Sonesta ES Suites Princeton. Lodging expenses for visitors who stay at this property will be direct billed to PPPL and not charged to Departmental Admin's PPPL Travel Card.
- If visitor is staying at another hotel, Departmental Admin must request a credit card authorization form from the hotel, complete the form with his/her PPPL Travel Card information, and return it to the hotel to ensure that the lodging expenses are charged to PPPL and not on the visitor's personal credit card.
  - Providing the PPPL Travel Card number to book the room only guarantees the reservation. It is not an authorization to charge the credit card for the stay.
  - Departmental Admin must provide Princeton University's sales tax exemption form to the hotel and request that sales tax is not charged to the PPPL Travel Card.
  - Only request room & tax to be charged to the PPPL Travel Card. Visitors are to be personally responsible for any incidental expenses.

### Ground Transportation

- If a car service to/from the airport and Princeton has been requested and approved in the Travel Request, it can be booked in Concur using the Departmental Admin's PPPL Travel Card.
- If a rental car has been requested and approved in the Travel Request, it can be booked in Concur or with Graycar. If direct billing for rental car is requested, reservation must be made with Graycar using specific vendor(s) that PPPL has directly billing agreements with.
  - The visitor's delegate must inform the visitor of the following to avoid non-reimbursable expenses being incurred:
    - PPPL will reimburse up to the cost of a midsize-intermediate sedan vehicle.
    - PPPL funded travelers are expected to refuel the rental car prior to returning to the rental agency and to decline any pre-paid fuel options.
    - GPS and satellite radios are unallowable expense for vehicle rentals.
    - The visitor should purchase the minimum LDW insurance coverage from the rental car company as non-PU/PPPL employees are not covered by the University's auto insurance policy.
- Visitors can also utilize NJTransit or Uber/Lyft and request reimbursement.

## Expense Report

At the conclusion of the trip, the delegate is responsible for completing and submitting the expense report for the trip on behalf of the visitor.

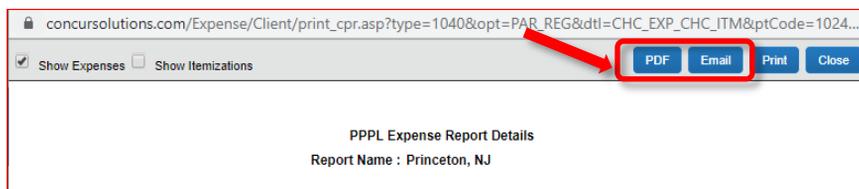
**Note:** Traveler/visitor is still responsible to acquire their receipts from the hotel / car rental car company even when the expense has been direct billed / prepaid by PPPL in order to verify that all charges on the invoices are accurate.

**Note:** Be sure to account for all travel costs incurred by the visitor; including any expenses that have been prepaid by / direct billed to PPPL (i.e., airfare, train fare, lodging, car service, etc.)

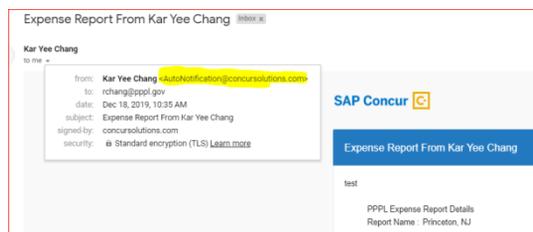
- A pdf version of a complete expense report printed out of Concur should be signed by the visitor, certifying that the expenses listed on the report are accurate and were incurred while on official PPPL business.
  - a. After all expenses have been entered into the expense report, click on **Print/Email**, then **\*PPPL-Detailed Report with Summary Data**



- b. In the pop-up window, you can either “PDF” the document and then send it to the visitor for signature via email, or email the document to the visitor directly from Concur



**Note:** If you choose to email the document to the visitor directly from Concur, make sure to type in the comment field to ask the visitor to sign and return the document to your **pppl.gov email address**. Emails sent directly from Concur are from [autonofications@concur.com](mailto:autonofications@concur.com) and you will not receive a response if the visitor “replies” to the email received.



- The signed expense report should be attached to the expense report in Concur, and routed for proper approvals and reimbursement.

## Visitor's Travel Transactions on PPPL Travel Card

If you used your PPPL Travel Card to pay for travel costs for the visitor, follow the steps below to reconcile the transactions from your account.

1. Complete and submit an expense report for the visitor as soon as the trip concludes to ensure timely reimbursement to the visitor. Include all costs that were charged to your card and mark the costs as company paid. Notate in the comment section that it was charged to your PPPL Travel Card.



**Note:** Transactions cannot be “transferred” from your Concur account to the visitor’s account. Each expense prepaid must be created and added manually in the visitor’s expense report.

2. Send an excel spreadsheet to the Travel Office with:
  - Visitor’s name
  - Travel Request ID
  - List each transaction that was charged to your PPPL Travel Card, including the vendor name and actual amount charged
3. Once the visitor’s expense report has been reviewed and processed by Accounting, the Travel Office will reconcile the transactions from your account