SIPI Travel & Reimbursement Procedures

Travel

For details specific to Dr. Narayanan's SAIL lab please review: https://sites.google.com/a/usc.edu/sail-scuba-administration/home

For details specific to Dr. Leahy's BIG lab please review: https://sites.google.com/usc.edu/big-lab/home

Most projects in Electrical and Computer Engineering are grant funded by various government agencies (NSF, NIH, etc.), therefore, we must adhere to the Fly America Act, which means we must fly on US carriers or co-share partners whenever possible, even if the ticket is more expensive. If travel is being charged to a gift account, you do not have to adhere to the Fly America Act and can go with the lowest fare.

The following procedures must be followed when traveling on USC business:

1. Once you and your advisor decide that you will travel for a conference, an approval email and the project or account number to be charged must be sent to the administrator.

2. Conference registration should be made as soon as conference registration is open and your advisor has approved. Registration fees can be paid with a staff credit card. Contact the appropriate staff for registration.
   - Provide all the information required for registration to staff or, if possible, fill out completely, save, and send login and password to staff to complete.

3. Contact Allison Holms at Christopherson Business (CB)Travel via email at allison.holms@cbtravel.com or call 801-327-7612 to arrange air travel. CB Travel will always find flights under the Fly America Act unless instructed not to. CB will require the following information in order to arrange your travel:
   i. Contact Phone Number/Cell Phone
   ii. Email Address where you would like to receive a copy of your flight itinerary
   iii. Frequent Flyer # (If Applicable)
   iv. Known Traveler Number (If Applicable)
   v. Seat Preference (Aisle/Window)
   vi. Full name as it is written on government-issued I.D. card.
   vii. Date of Birth
   viii. Gender

   Once you and CB Travel have finalized your travel details, have them email the itinerary to the appropriate staff member for payment. Allison has Gloria’s card on file.

4. Hotel reservations should be made and paid for by the traveler and submitted for reimbursement after the trip.

5. Contact the Student Health Insurance Office if the conference you attend requires proof of medical coverage abroad.

6. We recommend using the SAP Concur Mobile or Tripit Pro apps to help manage your receipts and reimbursements. For more information, see Get Mobile Apps

7. While traveling, keep all business-related **itemized** receipts for meals, transportation, etc. Take pictures of all receipts on your phone. Please note: Itemized receipts are mandatory. Submitting the credit card receipt only may not get reimbursed. Not all travelers will be reimbursed for meals; speak to your advisor before traveling.

8. After you return, submit for reimbursement within 30 days of returning to USC on the Travel and Expense Portal and follow the directions below :
   a. Assemble receipts in date order
      i. don't mix non-travel receipts with travel receipts
      ii. don't combine trips - each trip is a separate reimbursement request
   b. Go to your Profile, Profile Settings. Select Expense Delegates. Add the appropriate Administrator as an expense delegate.
      - Annie Yu, annhuayu@usc.edu – Maryam Shanechi
      - Gloria Halfacre, gloriah@usc.edu – Chris Kyriakakis, Jay Kuo, Antonio Ortega, Krishna Nayak, Mahdi Soltanolkotabi, Keith Jenkins, Allan Weber, and Bart Kosko
      - Tanya Acevedo-Lam acevedol@usc.edu – Shri Narayanan, Richard Leahy, and Anand Joshi
      - Estela Lopez, estelalo@usc.edu - Justin Haldar

      You must check all the boxes and make sure you hit the save button.
   c. Under the **Expense Tab** (DO NOT use the Request Tab), Create New Report.
      i. **Type of Report:** Post-docs select Employee Travel or Non-Travel; students select Guest or Student
      ii. **Report Name:** Conference name, year, your name
      iii. **Trip Type:** Domestic, International, or Non-travel
      iv. **Expense Purpose:** For conference travel, select Professional Development/ Conference/Training. For non-travel select Research Support.
      v. **Detailed Business Purpose:** To attend and present at Conference Name.
      vi. **Report Start and End Dates:** These are your travel dates.
      vii. **Personal Travel:** Answer as needed
      viii. **Traveler Type:** Student or Post Docs (select appropriate type)
         1. For **Students:** Enter Employee ID number, first and last name, home mailing address

        2. For **Post Docs**: Enter first and last name, USC as the Payee Organization, mailing address
    ix. **PPGG Type, Value, Cost Center, Cost Center Approver:** Leave blank unless your administrator/faculty provided this information.
    x. **Travel Allowance:** Select **No**, I do not require Travel Allowance. We do not allow Per Diem for students and Post Docs unless it has been pre-authorized.

d. Adding Expenses
    i. **Create New Expense:** Select the appropriate expense type (meals, hotel, ground transportation, etc.)
    ii. **For International Travel**: Make sure that you select the correct currency for your trip.
    iii. Select **Group Meals (<10 or 10+)** for meals that include more than yourself. You will need to add each attendee's name.
        1. Add the restaurant's name in the **Vendor Box** and add the **City of Purchase**.
        2. Answer the question, **Was Alcohol Purchased?** No. Alcohol is a "government unallowable" expense, so don't submit receipts for alcoholic beverages (subtract the alcohol expense from the meal expense).
        3. Reminder: you need to upload the **ITEMIZED** receipt for all meals.
    iv. **For Uber/Lyft**: select Ground Transportation (taxi, ferry, ride-share, etc.)
        1. Type of Transportation: will be **ride-share**. Do not use Car Service/Limousine)
    v. **Hotel/Lodging:**
        1. If the Hotel can't be found in the Vendor Box, select other and then add the hotel name in the comment box.
        2. You will have to complete the **Attendees** and **Allocate** tabs at the top.
    vi. Add your Bank/Credit Card statement showing proof of payment. (Especially for foreign rate conversions). Only need to upload the pages that show the charge(s). Do not upload anything with your account number on it. If the account number is on the page you need to upload, [redacted] black it out first.
    vii. Before you Submit the Report, notify your administrator to review it first.
    viii. Once the administrator has confirmed that the report is correct and complete, you will be instructed to submit the report.

e. Once you submit the report, you should be able to review the expense report in the report library.
    i. Select the report
    ii. Under the details select Audit Trail and you will be able to see where the report is during the approval process.
    iii. You will receive many emails during the approval process. These are just notifications with no action items.