

UB School of Pharmacy and Pharmaceutical Sciences Resident Travel Procedures

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Step 1: Request approval for travel -

- UPRS residents (GPPC, BMG, RPCI)
 - Email Mary Kruszynski (mek5@buffalo.edu) or Dr. Erin Slazak (emsabia@buffalo.edu) for travel approval BEFORE BOOKING OR PAYING FOR ANYTHING.
- Non-UPRS residents (BPC, Middleport)
 - Submit a Department of Pharmacy Practice Travel Request form and University at Buffalo (UB) Travel Pre-Approval Form* to William Prescott prescott@buffalo.edu and copy Andrew Fogelsonger afogelso@buffalo.edu and Dr. Erin Slazak (emsabia@buffalo.edu) BEFORE BOOKING OR PAYING FOR ANYTHING.
 - *UB form (Funding source is State and account number is 740080)

Step 2: Register and book travel and lodging -

- UPRS residents (GPPC, BMG, RPCI)
 - Once travel has been approved...
 - We can pay for **meeting registration** directly so you do not have to pay out of pocket and seek reimbursement. Complete the meeting registration form and forward a copy to Mary. She can pay for your registration directly.
 - Purchase your **flights**. You can request an advance to be paid for this up front. Please submit to Mary:
 - Your airfare receipt & flight itinerary
 - Documentation that you used a personal credit card to purchase the flights
 - Printout of that charge on your credit card statement
 - Copy of credit card statement
 - PLEASE BLACK OUT ALL PERSONAL INFORMATION
 - Book your **accommodations**
 - Accommodations/lodging cannot be reimbursed until *after* travel.
 - Be aware of individual cancellation/change policies.
- Non-UPRS residents (BPC, Middleport)
 - Once travel has been approved...
 - We can pay for **meeting registration** directly so you do not have to pay out of pocket and seek reimbursement. Complete the meeting registration form and forward a copy to Mary. She can pay for your registration directly.
 - Purchase your **flights**. You can request an advance to be paid for this up front. You will need to submit this as an expense report in Concur and will need the following documents to be uploaded in order to get paid:
 - Your airfare receipt
 - Documentation that you used a personal credit card to purchase the flights
 - Printout of that charge on your credit card statement
 - Copy of credit card statement
 - PLEASE BLACK OUT ALL PERSONAL INFORMATION

UB School of Pharmacy and Pharmaceutical Sciences

Resident Travel Procedures

Meeting At-A-Glance schedule

- Submit to Erin Slazak for approval via Concur
- Book your accommodations
 - Accommodations/lodging cannot be reimbursed until *after* travel.
 - Be aware of individual cancellation/change policies.

Step 3: Travel -

- UPRS residents (GPPC, BMG, RPCI)
 - Save ALL of your boarding passes (electronic is acceptable). You will need them when you submit for reimbursement, even if you received an advance on your airfare purchase.
 - You will likely claim a meal per diem each day, which provides a set dollar amount for breakfast and dinner. Therefore, meal receipts need NOT be retained.
 - Save receipts for any taxis/shuttles/ride share, particularly from the airport to the hotel and back. If meeting shuttles are available to get from your hotel to the meeting daily, you are encouraged to utilize those (or walk).
- Non-UPRS residents (BPC, Middleport)
 - Save ALL of your boarding passes. You will need them when you submit for reimbursement, even if you received an advance on your airfare purchase.
 - You will likely claim a meal per diem each day, which provides a set dollar amount for breakfast and dinner. Therefore, meal receipts need NOT be retained.
 - Save receipts for any taxis/shuttles/ride share, particularly from the airport to the hotel and back. If meeting shuttles are available, you cannot claim the cost of transportation/shuttle.

Step 4: Prepare and submit your request for travel reimbursement –

- UPRS residents (GPPC, BMG, RPCI)
 - Once travel is complete...
 - Submit to Mary:
 - Meeting at-a-glance schedule
 - Boarding passes (even if you received an advance on airfare) – electronic boarding passes are acceptable
 - Hotel folio
 - This should show your name a ZERO DOLLAR balance, indicating that the room has been paid for in full.
 - If you split a hotel room, each occupant should pay for their portion and request a separate folio indicating their name, ONLY the portion they paid for, and a ZERO DOLLAR balance.
 - If you paid for an Airbnb (or equivalent), submit the receipt showing that the rental was paid for in full. This should also have your name on it.
 - Mary will determine, based on your travel dates and times, how much per diem you will receive.

UB School of Pharmacy and Pharmaceutical Sciences

Resident Travel Procedures

- You are eligible to claim breakfast and dinner each day of travel unless meals are provided per the conference agenda.
 - On your departure day and arrival day:
 - You are eligible for breakfast if you leave your home for travel before 7am.
 - You are eligible for dinner if you return home from travel after 7pm.
- Non-UPRS residents (BPC, Middleport)
 - Create an expense report in Concur (see Concur instructions)
 - Attach the following receipt images:
 - Meeting at-a-glance schedule
 - Document showing conference hotel rates
 - Boarding passes (even if you received an advance on airfare)
 - Hotel folio
 - This should show your name a ZERO DOLLAR balance, indicating that the room has been paid for in full.
 - If you split a hotel room, each occupant should pay for their portion and request a separate folio indicating their name, ONLY the portion they paid for, and a ZERO DOLLAR balance.
 - If you paid for an Airbnb (or equivalent), submit the receipt showing that the rental was paid for in full. This should also have your name on it.
 - NOTE: Concur will ask information about room rates and taxes/fees and then *multiply* those by the number of nights you stayed. If your rates change day to day and the total that Concur calculates does not match your actual total, you will need to After you enter the amount in Concur and it indicates that it doesn't equal the correct total, on the left-hand side, it lists the expenses and the cost per night. You can go into each individual night and adjust the amount total so it equals to the total amount due. You may have to adjust each total by a cent or two to get the correct grand total of the hotel so each day will not be the same (which is ok!).
 - Any transportation receipts (i.e. Uber/Lyft/shuttles/taxis)
 - Guidelines for per diem/daily meal allowance:
 - You are eligible to claim breakfast and dinner each day of travel unless meals are provided per the conference agenda.
 - On your departure day and arrival day:
 - You are eligible for breakfast if you leave your home for travel before 7am.
 - You are eligible for dinner if you return home from travel after 7pm.
- Submit your Concur expense report to Erin for approval.