As we return to business travel and events, it is important to make sure that you have your Travel & Entertainment (T&E) Card ready to use for your next trip or event. For existing cardholders, please ensure that you have received and activated your T&E Card. If you have not received your new T&E Card, please contact IPPS via Services & Support.

For new cardholders, the T&E Card is a reloadable card that eliminates the need to carry cash or a checkbook. It can be used at participating merchants and for travel-related expenses such as hotels, transportation, and meals. The T&E Card can be loaded with funds from a checking or savings account and can be used anywhere that accepts magnetic strips or chip cards. For existing cardholders, please note that the rebranded name of the card is now "UC San Diego Travel & Entertainment Card." Please check the corner of your card and verifying that it has the rebranded name:

In next week's Fund Management Office Hours on August 26, we will focus on CESE reporting. Come to this week's office hours on Thursdays @ 11:00am - 12:00pm and Fridays @ 2:00pm - 3:00pm prepared to talk about CESE reporting, tracking, and claiming expenses after the business trip occurs.

To ensure proper booking in Concur, please be sure to check the "Invoices Only" field for business or personal bookings. Although we encourage personal travel to be booked in Concur, the one exception is when personal travel is for business-related insurance, which is not included.

Car Rentals in Concur

The way to rent a car for personal travel is to open Company Notes

Invoices and claims must be supported by appropriate documentation. This includes, but is not limited to, 

- Invoices for goods and services, including invoices for travel and entertainment
- Receipts for meals, lodging, and transportation
- Documentation for business-related insurance
- Documentation for personal travel

General Tips

- If you are displaying a "No" for Is this an Expense? Then the City/County needs to be put into the Chart String field. If the City/County is not put in the chart string, it may be possible that the City/County will not be charged accordingly.
- If you are displaying a "Yes" for Is this an Expense? Then you need to build a PO at the end of the requisition.
- Invoices need to be paid within the next 90 days for the City/County to get their money back.
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The course provides an overview of UC San Diego travel policy and procedure, including how to book travel in Concur, how to use the TripIt Pro platform, and how to take advantage of the benefits of the T&E Card. The course will be held on Thursday, August 26, 2021 @ 1:00pm - 3:00pm.

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