



Club Travel Checklist

Concur Profile:

- Complete the profile form, leaving it with the Union Business Administrator. This form only needs to be completed once.
- Using Concur Checklist set up expense delegates and travel assistants/travel arrangers.
- Sign up to receive e-receipts.



Before you leave:

- Check budget for approved items/amounts.
- Meet with your SARP; complete required forms and Concur profile if necessary.
- Call Direct Travel directly; do not make arrangements on concur.com or through the hotel.
- Submit electronic requisitions or drop requisition forms off in Business Administrator's Office in the Rensselaer Union.
- Forward all emails from Direct Travel to the Union Business Administrator.
- Pick up Club Operating Funds as needed prior to the trip.
- Drop off Travel Itinerary at the front desk of the Administration Office (RU 3702).
- Have Direct Travel contact info card and Union Business Administrator's business card prior to departing Rensselaer.



While you are there:

- Check with hotel prior to departing to verify that the credit card is on file.
- When checking in at the hotel, you should **not** need to present a personal credit card for incidentals. Be sure the hotel room charges hit the credit card provided by Direct Travel. Obtain a copy of the receipt, which you will need to complete your expense report on concur.com.

When you come back:

- On the first business day after your trip, return all unspent cash, turn in all receipts for the trip.
- Deposit trip fees based on actual cost of trip.
- Log into concur.com to complete the expense report for the trip once you return. If you need assistance, please contact the Union Business Administrator.

Questions, call (518) 276-6505 or email BusinessAdministrator@union.lists.rpi.edu.

**ALL ARRANGEMENTS SHOULD BE MADE AT
LEAST ONE WEEK PRIOR TO THE TRIP.**