

HARVARD
UNIVERSITY



2021 Travel & Reimbursement Overview

November 4, 2021

Agenda

- Harvard Preferred Agencies
- Booking your Travel
- Using Concur & Concur Updates
- Resources
- Contacts
- Questions?



Harvard Preferred Agencies

Agency	
<u>Egencia</u> Ph: 800-373-4979	<ul style="list-style-type: none">• On-line booking tool (low fee for on-line booking)• Agent assisted bookings available• Use on-line for less complicated itineraries
<u>The Travel Collaborative</u> Ph: 617-497-8123	<ul style="list-style-type: none">• Local full service, boutique agency• High touch service with insider destination and travel knowledge• Group & meeting travel services• Affiliated with Tzell Travel
<u>BCD Travel</u> Ph: 617-496-8000	<ul style="list-style-type: none">• Full service agency• Group & meeting travel
<u>Milne Travel</u> Ph: 781-843-8952	<ul style="list-style-type: none">• Full service agency• High touch service• Group & meeting travel

Use of these agencies automatically registers International travel with [International SOS/ Mytrips](#)

Benefits of Using Preferred Agencies

- **Traveler profile*** – agencies can create a traveler profile with all of the traveler’s pertinent information (i.e. loyalty, payment info, etc.) etc.
- **One stop shopping** – air, hotel and car reservations
- Agents are **familiar with Harvard Travel Policies and restrictions including the Fly America and Open Skies Act** - required for Federal and cost-share funds
- **Travelers are identified** as **“Harvard travelers”** – eligible for applicable discounts, benefits and added value features including preferred seating, priority boarding and priority re-accommodation from our airline partners
- **Negotiated pricing** –Access to Harvard’s discounted pricing on many carriers including fully refundable “flat fares” on certain frequently traveled city-pairs with AA and JetBlue (some Jet Blue fares include a free bag)

* profile forms are available on the Preferred Agency Tab of the Travel Website



Additional Benefits

- **Added value services** – Agents work with the vendors on our behalf (penalty waivers, no show charges, seat & waitlist clearance, assistance with refunding/voiding tickets etc.)
- **Additional level of support** - Agents can provide an additional support in the event there are issues while you are traveling
- **Duty of care** –
 - Feeds to [International SOS](#), the University's vendor that provides 24-hour worldwide medical, mental health and security assistance and evacuation services to eligible Harvard students and employees while on Harvard related travel abroad.
 - Itinerary changes are fed in as well, saving time and effort as users don't need to log in to update their registration
- **Provide 24/7 assistance**



Additional Benefits continued

- **Fare matching** – Agents can work with airlines to try and match a lower fare on a competitor airline
- **Track and report CO2 emissions** for Harvard's Office for Sustainability



Harvard Preferred Vendors & Benefits

Visit: <https://travel.harvard.edu> for the full list

<p><u>Airlines:</u> American, Delta, Jet Blue, Porter Airlines, United, British Air, Emirates, Cathay Pacific, Japan Airlines & more</p>	<p>Discounted pricing, name changes, preferred seating (at no additional cost), priority boarding, priority re-accommodation, priority upgrades</p>
<p><u>Hotels:</u> Chainwide Agreements with Marriott, Club Quarters, Choice Hotels in addition to discounts at Cambridge and Boston Hotels</p>	<p>Harvard employees who join Marriott Bonvoy frequent stay program are upgraded to Silver Elite Status (must be a new membership using Harvard e-mail address)</p>
<p><u>Car Rentals :</u> Enterprise/National and Hertz</p>	<p>Discounted pricing, free program memberships and University required insurances included in the rates (US rentals only)</p>

Egencia Booking Tips

- Tickets are issued in the name exactly as it appears in the “Traveler Name” field; must match your government issued ID
- Make sure the name in your “Travel Profile” matches your Passport, TSA Pre check and Frequent flyer (Loyalty Program) information. If they do not match exactly, you may not receive your TSA pre-check or loyalty points
- Name changes or adjustments (due to marriage, divorce, etc. or to add a middle name, initial) must be requested with fad_travelmgr@harvard.edu
- All other profile information can be changed by the user or their travel arranger
- Keep credit card information updated – the mailing address and expiration date must match in order for transactions to be completed
- If you are canceling a **refundable** ticket, ask the agent to refund it for you as opposed to putting it in your travel bank



Additional Egencia Tips

- **READ THE RULES OF THE FARES/RATES YOU ARE BOOKING** – Airlines, Hotels & Cars have many rate types with different rules for cancellation, refund, access, payment type, etc.
- Use parameters to better define your search results when booking air:
 - Departure/Arrival Times, Nonstop, Refundable/Non-refundable
- Contracted carriers will be have a “Company Preferred Airline” label. Since discounts vary by fare type, the discounted rates may not appear until the flight is selected and you arrive at the next screen.
- Multiple forms of payment and/or e-mail addresses can be added to a Travelers Profile
- When booking cars – only the rates flagged with “Company Negotiated” (a green box under the car image) will have the required insurance automatically included; otherwise required insurance must be selected at time of rental.



General Travel Tips

- Use any unused tickets (Harvard Purchased) you might have when booking your trip
- Book non-stops when possible to avoid additional connection points and increased exposure
- Book early, however be prepared for airline schedule changes
- Book car rentals as early as possible using our preferred partners – Enterprise, National or Hertz.
 - Take advantage of free loyalty program memberships.
- Consider purchase of refundable tickets for situations where the itinerary might change as long as budget and local school policy allows (contact your school finance office for additional information)

International Travel Tips

- Register your trip with [International SOS/My Trips](#)
 - Note: If tickets are purchased using a Preferred agency: **Travel Collaborative, BCD Travel, Milne Travel or Egencia**, travelers will automatically be registered for the [International SOS Program](#)
- Connect in the U.S. instead of through European cities to avoid additional exposure, changing entry regulations/restrictions and to prevent risk of being quarantined mid-trip.
- Continue to monitor entry/exit requirements throughout your trip as rules are changing on a regular basis.
- Register your International trips with International SOS/My Trips
- Use US carriers, not codeshares (not even BA, LH, AF/KLM) as international carriers have been slow to issue refunds on canceled flights, if they refund at all.



Concur Helpful Hints

- Use the Mobile App (additional information is available on the Concur website)
- Traveler – provide as much information as possible on the receipt for your delegate. Use mobile app to upload receipts whenever possible.
- Business purpose needs to contain the who, where, when, what and why for each transaction
- Business purpose copies from header unless you change it at the line level.
- Using duplicate receipts will throw an audit flag, be sure to include the correct receipt – for example car service to and from a location. Include comments to provide as much information as possible.



Concur Update

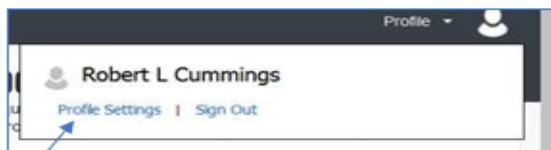
- Concur has migrated to a new payment processor (Bambora) for “out of pocket” direct deposit payments
- Harvard will transition on **November 8, 2021**, requiring reimbursees to:
 - Complete a one-time opt-in process to continue to receive payments for their out of pocket expenses (details following)
- Reimbursees cannot opt-in prior to November 8th
- The opt-in process authorizes Bambora to make deposits using reimbursee’s existing banking information in Concur

Important Information

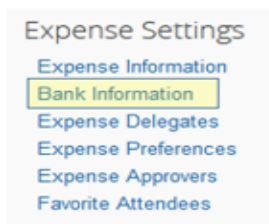
- All reimbursees must complete this task
- No need to re-enter Bank Information
- Opt-in is **not available on Mobile**, reimbursees will have to opt-in on their desktop
- Only the **Reimbursee** has the capability to opt-in
 - Not an Admin or an Exception Delegate
- President and Fellows of Harvard College will show as the payee effective November 9th on your personal bank statements (currently Concur Expense)

Opt-in Method 1: Manually Under Profile Settings

- a. Login to Concur, click Profile, then Profile Settings.



- b. Under Expense Settings, click Bank Information.



- c. Tick the "I authorize the use requirement below" check box, and Save.
Note: The Personal/Office address may be required but it is protected.

1. Login to Concur on the computer
2. Click on Profile
3. Click Profile Settings
4. Under Expense Settings at the left-hand side, select Bank Information
5. Fill out the required fields
6. Check the tick box
7. Save

Bank Information

Personal Address Line 1 Personal Address Line 2

City State ZIP Code

I authorize the use requirement below



You hereby (1) authorize direct deposit into your bank account for funds due to you from your employer using electronic funds transfer (EFT) payment services provided by Bancorixa Inc. or any of its affiliates, (2) represent that the information that you enter is accurate and complete in all respects, and (3) agree that you are solely responsible for ensuring that all such information remains accurate and complete in all respects.

John Q. Public
135B Main St.
Sometown, OH 98765

Pay to the order of _____ Dollars

Bank of Sometown

VOID

Routing Number is usually located between the  symbols on your check and is 9 digits.
Account Number is usually located before the  symbol on your check and is 3-17 digits.

Opt-in Method 2: From the Report Submission Screen

- Can only be done on the desktop
- Will not appear on the mobile app
- Notification will only trigger if there are out of pocket expenses on the report

Bank Information: Update ×

I authorize the use requirement below

You hereby (1) authorize direct deposit into your bank account for funds due to you from your employer using electronic funds transfer (EFT) payment services provided by Bambora Inc. or any of its affiliates, (2) represent that the information that you enter is accurate and complete in all respects, and (3) agree that you are solely responsible for ensuring that all such information remains accurate and complete in all respects.

Submit Report Cancel

Report Submission by Delegate

If a delegate submits a report on behalf of their traveler and the “opt-in pop up” comes up, it will be a hard stop and they will get this warning:

Bank Information: Update ×

! You cannot authorise these use requirements. Contact the claim owner to authorise the use requirements and submit this claim.

I authorise the use requirement below

You hereby (1) authorize direct deposit into your bank account for funds due to you from your employer using electronic funds transfer (EFT) payment services provided by Bambora Inc. or any of its affiliates, (2) represent that the information that you enter is accurate and complete in all respects, and (3) agree that you are solely responsible for ensuring that all such information remains accurate and complete in all respects.



Sample of Email Notification for Reports in Flight

- Example:
 - Report submitted on 11/5, approved on 11/9, and reimbursee did not manually opt-in prior to report approval
 - Notification below will trigger and reimbursee will need to follow the steps below to manually opt-in
 - Report will be re-sent for payment



Expense Pay attempted to make an electronic payment directed to your bank account that was denied payment by the banking system.
The banking system indicated the following reason for the denied payment: Expense Pay is not authorized for deposits. Please review the banking details in your Concur profile and Save to indicate your authorization. For step by step instructions click [here](#)
You should log in to Expense and verify the accuracy of your electronic payment information in the My Profile, Banking information area. Use the reason stated above as a guide to determine what about your banking information requires modification.
Note that no electronic payments can be transacted until Expense Pay is able to verify the accuracy of account information.

Link To Expense:

<https://msprqa3.concurtech.net/>

Concur Training Links

Concur Training | Harvard Travel Services

Includes online tutorials including:

- [Setting up your Concur Profile](#)
- [Creating a Basic Expense Report](#)
- [Creating More Complex Expense Reports \(inc. Itemizing & Allocating Expenses\)](#)
- [Assigning a Delegate & Submitting Reports Created by your Delegate](#)
- [Using Mobile Apps to Upload Receipts](#)
- [Tips and Tricks](#)



Resources

- **Harvard Travel Website** – <https://travel.harvard.edu>
 - For information about our preferred vendors, travel policy, reimbursement (Concur tab), Meetings and the latest Coronavirus Travel Guidance
 - [COVID 19 Travel & Reimbursement Guidance](#)
- **Egencia Training** – [Welcome to Egencia](#)
 - [Egencia Training](#) (sign up for classes)
- **Global Support Services** - [Travel | Harvard GSS](#)
 - To Register your International trip Visit the GSS Website
- **Concur Website** – <https://travel.Harvard.edu/concur>
 - On-line tutorials available under “Concur Training”
- **Harvard Card Services Site** – <https://cardservices.Harvard.edu/home>
- **Harvard University Travel Policy** - [Travel Policy | Financial Policy Office \(harvard.edu\)](#)

Contacts

- For questions related to **Concur or Reimbursements**:
 - e-mail concurhelp@harvard.edu or call 617-8500, option 2
- For questions related to **University Card Programs** (Corporate, Purchasing, Department or Declining Balance)
 - e-mail concurhelp@harvard.edu or call 617-8500, option 7
- Stacey Clifton, Sr. Manager Travel, Expense & Card Services – stacey_Clifton@harvard.edu