

# Tisch Travel Card, Reconciliation & Using Apptricity FAQ

## TUFTS TRVL CARD AND ACCESSING APPTRICITY

Anyone traveling on behalf of the university and all managers need an Apptricity account to reconcile their expenses and approve the expenses of their staff.

- Information on the [Tufts travel card](#).
- Fill out a one-time [application](#) and return it to TSS for a corporate travel card and to use Apptricity.
- Login to [Apptricity](#).

## USING YOUR TRAVEL CARD

Please use the Tufts credit card whenever possible. You may still need to use cash (e.g. when tipping hotel housekeeping), which can be refunded to you as an out of pocket expense. Refer to the [Tufts University Travel and Business Expense Guidelines](#).

Can I request a per diem?

No. Tisch policy is that we do not allow per diem. We encourage using the card whenever possible so, you do not have to spend your own money in advance.

Do I need to use the Tufts flight request system to book air travel?

No.

## TIMING

When you spend money on your Tufts card, it goes to your Apptricity account as an unassigned expense. Please submit a report to reconcile expenses as soon as possible after completing your travel, no more than 30 days after you return. If expenses are unaccounted for, you will receive a warning and then they will freeze your card.

But, what if I book travel in advance, say I register for a conference or book a flight in January for an event in May?

Start a report for the credit card expenses, just don't submit it until you return. As long as there aren't expenses floating with no report "shell" over them, that is fine.

## RECEIPTS

For credit card items, you need a receipt for anything over \$50. Under \$50 is not required, but is appreciated. Only the lodging receipt needs to be added line-by-line; other receipts can be scanned and uploaded en masse at the "header" level of the report if you prefer.

All out of pocket expenses need a receipt, unless there simply is none (e.g. hotel tip). If there is no receipt for a small out of pocket expense, that's fine. Just enter the item as "miscellaneous expense", which won't require one in Apptricity (entering it as "lodging" always requires a receipt).

There is also an Apptricity app that lets you upload receipts from your phone, if you prefer.

What happens if I lose a receipt for something over \$50?

You need a missing receipt affidavit form that will be signed by your supervisor.

My receipt won't upload. I'm getting an error.

Check to see if there is punctuation in the file name of the file. Apptricity doesn't like punctuation.

## CREATING REPORTS

Travelers can create reports directly in Apptricity. Or, if you prefer, you can use the Travel Intake Form ([access.tufts.edu/forms](https://access.tufts.edu/forms)) and TSS will create the report on your behalf (you will still need to review and submit the form in Apptricity yourself). Either method is fine.

If you use the Intake Form, you will still need to provide receipts to TSS, and they appreciate if you add a short note on your receipt (e.g. taxi, dinner) to help them connect them to the expenses.

Using either method, make sure you include:

- Description
- Destination
- Purpose (typically use: "business expense")

You may need to add detail to individual expenses before you can move them into reports if you do it yourself (usually adding an account and category). There will be a red exclamation mark if it's needed. Account is typically: "domestic travel".

If you purchase food for an event using your travel card, please use account 5499 ("non-allocable DeptID") and not 5431 ("outside catering"). This will keep all food costs in one account and help with tracking and budgeting. TSS uses 5431, but we don't track these expenses in that account for the library.

Make the start/end dates of the report the dates of your actual travel event (simply bypass the error message that says dates don't match if you bought a flight or conference registration in advance).

Before submitting your report, add your supervisor as an "ad hoc" approver. This way the report will go to them before they pass it on to the Director for final approval. Unfortunately, this must be set with each report, and can't be set permanently.

What is the Library's DeptID?

A780210

## MILEAGE/GAS

Gas purchased for a rental car can be reconciled normally, but personal car use should be entered as mileage instead. It is considered an out-of-pocket expense. The system automatically calculates compensation for the miles you traveled, based on a standard rate. If you travel on a weekday, calculate mileage from work (not your home) to your destination. If it is a weekend, then calculate from your home. Refer to the [Tufts Mileage Reimbursement Rate and How it is Calculated](#).

## AD HOC APPROVER RESPONSIBILITIES

When you receive a notice that a report has been submitted by your staff, you should:

- Confirm the amount roughly aligns with the original request.
- Make sure all expenses are “within reason.”
- Make sure required receipts are included and include necessary detail (date, amount, service), and that the report looks complete.
- Approve report up to the Final Approver (Tisch Director).

## MORE HELP

Check with your supervisor. You can also always call, open a ticket, or come in-person to TSS for assistance. They have a team of 5 people working on travel and are happy to help!

Website: [access.tufts.edu/contact-tufts-support-services-tss](https://access.tufts.edu/contact-tufts-support-services-tss)

Call (617) 627 – 7000

Please share any concerns about fraud related to your Tufts card with TSS right away.

Also view the [Tufts Travel Policies](#) for more information on travel.