

# Concur

## FAQs and Helpful Tips

All travel related tasks below are done from the Travel department website

<https://travel.uconn.edu>

Pre-Travel	
<i>To Do List</i>	<p>-Apply for an UCPEA award if the purpose of travel qualifies for UCPEA professional funds. <a href="http://www.Ucpea.org">www.Ucpea.org</a></p> <p>-Complete your Concur profile – Log in to the Concur Travel system here: <a href="https://travel.uconn.edu">https://travel.uconn.edu</a></p> <p>-Before travel takes place, complete your profile in Concur including your home address and workstation which will allow Concur to calculate mileage reimbursement for mileage driven with your personal vehicle</p> <p>-Be sure to include the name of your delegate if you have one: <u>Request Delegate</u> (found under “Request Settings”) can submit a travel request for you <u>Assistant</u> (found under “Travel Settings”) can book travel arrangements for you <u>Expense Delegate</u> (found in “Expense Settings”) can create an Expense Report for you</p> <p>-Be sure to activate E-Receipt (found under “Other Settings”) as most major hotels will send receipts via the system.</p> <p>-Travel Card Application and Training Apply for a Travel Card and be sure to attach the card number to your profile so most expenses upload to the expense report directly. The Travel Card should be used when booking all hotel rooms, airfare or rental cars as well as all travel related expenses during your trip. This will simplify the expense reimbursement process as receipts are automatically uploaded into Concur. If you have not yet applied for a University Individual Travel Card, you must <u>complete the required training</u> and then <u>submit an application</u> for approval. Once the application is fully approved, it takes 7 – 10 business days for you to receive the card. Travel Cards will be mailed to the home address you provide on your application while employees are working remotely.</p> <ul style="list-style-type: none"><li>• Link to required Travel Card training and application for Travel Card: <a href="https://travel.uconn.edu/2019/11/15/1537-2-2/">https://travel.uconn.edu/2019/11/15/1537-2-2/</a></li></ul>
Travel Requests	
<i>Travel Card</i>	<p>-If not done yet, apply for a Travel Card before travel is booked as this card will be used to pay for all travel related expenses and will simplify the expense reimbursement process (see info above). Once the application is fully approved, it takes 7 – 10 business days for you to receive the card. Travel Cards will be mailed to the home address you provide on your application while employees are working remotely.</p>

<i>In-State Travel Hotel Eligibility</i>	- To determine hotel eligibility for in-state travel, both your home and workstation must be at least 75 miles away from your destination AFTER the miles of your one-way daily commute to your workstation have been deducted. There are exceptions to this rule. Please contact your department admin or Chris Czemske with questions.
<i>Travel Request Submission</i>	-You must submit a travel request <u>before</u> travel takes place - Before travel takes place, complete the profile in Concur and include your home address which will allow Concur to calculate mileage reimbursement for mileage driven with your personal vehicle -Per the University travel policy, approved by the Board of Trustees on April 29, 2020, travel that includes one or more <u>Segments</u> (airfare, hotel, <u>or</u> car rental expense), requires a fully approved travel request in Concur <u>prior to departing</u> for your trip.  -Travel Policy: <a href="https://travel.uconn.edu/travel-policy/">https://travel.uconn.edu/travel-policy/</a>
<i>Travel Request Approvals</i>	- Travel requests will be automatically routed to your immediate supervisor for approval.
<i>WALR Related Travel (most commonly applicable to NetEng &amp; Design teams)</i>	- If travel is required and related to a WALR or PMO project, please contact Regina Pelrine for the account # at <a href="mailto:regina.pelrine@uconn.edu">regina.pelrine@uconn.edu</a> Sub-accounts should <u>never</u> be included and is not a required field on the Concur report.  -Please include "WALR - Job/Project#" in the travel description/purpose field and comments section.
<i>Travel KFS Account Numbers (non WALR/PMO related)</i>	-If you do not know the KFS account number to use for your travel request, please email Chris Czemske at <a href="mailto:Christine.czemske@uconn.edu">Christine.czemske@uconn.edu</a> or Kara Whitehead at <a href="mailto:kara.whitehead@uconn.edu">kara.whitehead@uconn.edu</a> .
<b>Post-Travel</b>	
<b>Expense Reports</b>	
<i>Reimbursements</i>	- Expense reports are due within 15 days after the end date of travel. Be sure to use the correct KFS account #. Do not include a Sub-Account number. Contact Chris in the Business Office to confirm the KFS# at <a href="mailto:christine.czemske@uconn.edu">christine.czemske@uconn.edu</a> .
<i>Transaction Date</i>	-the date the expense was accrued. All transaction dates must fall within the Start and End dates of travel specified on your report.
<i>Agendas &amp; Conference Brochures</i>	-Conference brochures or agendas must be attached in the <u>Expense</u> report in Concur. They do not carry over to the Expense Report when attached to the Travel Request.
<i>Expense Report Approvals</i>	- Expense requests will be automatically routed to your immediate supervisor for approval. If there are exceptions or the expense report is submitted beyond the 60-day limit, it will be forwarded to your Director by Travel for further approval

<p><i>Hotel Invoices</i></p>	<p>- Hotel invoice charges need to be broken out by type of charge, date and amount and reported on separate lines (ex: nightly room charge, parking, taxes/fees, etc. should all be broken out as individual expenses on separate lines).</p> <p>-Averaging both hotel room rates or combining all daily taxes and fees charged and entering them on one line will result in the report being returned for revisions. Each nightly rate MUST be broken out as well as taxes, parking, etc.</p> <p>-<a href="https://media.pmo.its.uconn.edu/Itemizing%20Hotel/index.html">https://media.pmo.its.uconn.edu/Itemizing%20Hotel/index.html</a></p>
<p><i>Reimbursement for Personal Car Mileage Only</i></p>	<p>-Personal Car mileage training document listed on the UConn travel training and resources page: <a href="https://travel.uconn.edu/training-and-resources/">https://travel.uconn.edu/training-and-resources/</a></p> <p>-It is acceptable to submit 1 expense report per month of personal car mileage when numerous trips are made and all travel is being charged to the same KFS account number.</p> <p>-Each day of personal car mileage must be broken out as a separate expense line item. <u>The transaction date is the actual date of the personal miles driven.</u></p> <p>-All dates traveled must fall within the <u>Start</u> and <u>End</u> dates of the Expense Report.</p> <p>-Departure and Return to Home Address: check off both the box for Deduct Commute in left bottom corner <u>and</u> the box for Deduct Round Trip on the mileage detail. Concur will then calculate and deduct your daily commute to your Workstation location from your total mileage reimbursement (per travel policy: daily commute to and from workstation will be deducted from mileage reimbursement when leaving from and returning to home address).</p> <p>-If either Departure or Return is from or to your Workstation location, only check off Deduct Commute in left bottom corner so commute miles are only deducted from one leg of travel, not both.</p>
<p><i>Troubleshooting</i></p>	<p>-Please contact <a href="mailto:travel@uconn.edu">travel@uconn.edu</a> for assistance with Troubleshooting</p>
<p><i>UCPEA Awards</i></p>	<p>- The UCPEA award KFS # (specified in the award letter) should be used in the Account number field. Award letter must be attached to the expense report in Receipts. If the award amount does not cover the entire amount of total expense, the expense must be split between the UCPEA Award KFS # and the appropriate ITS travel KFS #. Confirm ITS travel KFS # with Chris in the Business Office at <a href="mailto:Christine.czemske@uconn.edu">Christine.czemske@uconn.edu</a> or Kara Whitehead at <a href="mailto:kara.whitehead@uconn.edu">kara.whitehead@uconn.edu</a>.</p>
<p><i>WALR Related Travel (most commonly applicable to NetEng &amp; Design teams)</i></p>	<p><b>-If travel is required and related to a WALR or PMO project, please contact Regina Pelrine for the account #. Do not include a Sub-Account number.</b></p> <p>-Please be sure to include the word WALR in the travel description/purpose fields as well as the project #.</p>
<p><b>Non-Travel Expenses</b></p>	
<p><i>Concur Guide for Non-Travel Expense Reports</i></p>	<p><a href="https://travel.uconn.edu/training-and-resources/">https://travel.uconn.edu/training-and-resources/</a> See the Expense Travel section</p>

# Concur Training and Resources

<https://travel.uconn.edu/training-and-resources/>

## Concur Videos

### Submitting a Travel Request

<https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

### Travel Request- Segments

Airfare- <https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

Hotel- <https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

Car Rental- <https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

### Travel Request- Expenses

<https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

### Travel Request- Bradley Airport Parking Pass

<https://media.pmo.its.uconn.edu/Creating%20a%20Travel%20Request%20V4/index.html>

### Booking Travel in Concur

<https://media.pmo.its.uconn.edu/Booking%20Travel/index.html>

### Creating an Expense Report

<https://media.pmo.its.uconn.edu/Creating%20an%20Expense%20Report/index.html>

### Itemizing Hotel Expenses

<https://media.pmo.its.uconn.edu/Itemizing%20Hotel/index.html>

### Helpful Tips – Expense Report

<https://media.pmo.its.uconn.edu/Creating%20an%20Expense%20Report/index.html>