

Concur Support Virtual Office Hours

Presented by:

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&

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Office Hours Monthly Rotation Schedule

Week 1 – Travel Requests

Week 2 – Expense Reports – Part I

Week 3 – Expense Reports – Part II

Week 4 – Navigation and Follow Up

Week 1: Travel Requests

FREQUENTLY ASKED QUESTIONS

1. Why do I need to create a Travel Request?
2. What is the difference between Request and Report?
3. How do I know what documents are required?
4. What is a cost comparison for, and how do I get one?
5. When can I book travel?
6. When will my request be approved?
7. Do I have to book through Concur?
8. Can I book the hotel through the conference site?
9. Can I book an apartment or Airbnb instead?
10. When do I use T&E card vs P-Card vs personal credit/debit card?

TIPS

- If you think it will be incurred on your trip, list it!
- Submit requests at least 2 weeks prior to domestic travel and 3 weeks for international travel
- Please see [here](#) for our Business Travel FAQs
- Requests will go through AT LEAST two steps of approval:
 - 1st Dept. Designated Approver
 - 2nd Business Office Approver
- If you need to make changes to your request after submittal, you can recall it

News & Alerts: Changes in the past six months

- Accountable Plan Policy: Out-of-pockets expenses must be submitted within 180 Days
- Taxation/Accountability Plan: Effective 4/25/24 any expense report approved by the Travel Team that has submitted out-of-pocket expenses more than 60 days old will be sent to payroll for taxation.
 - These started coming out in the May payroll. To request a review and dispute please email the Controller's office at controller@unc.edu
- Mileage Policy : Over 350 miles – IRS reimbursement rates \$0.67 & \$0.335. For over 750 miles flight cost comparison required or business justification for necessity to drive.
- Conference Agenda: The Travel Team now requires a copy of the conference details (dates, location, etc.) and the topics/agenda be attached to the expense report.

Please submit your service requests to: <https://go.unc.edu/concursupport>

Please send your emails regarding status of Expense Reports, Flight cost comparisons, policy related questions to: travel_team@unc.edu

Please contact WorldTravel at (877) 602-4950 or
uncch_travel@worldtravelinc.com

for assistance with booking air, car rental or hotel

For more information on policies/guidelines, please visit:
finance.unc.edu/services/travel

Concur Support Team Office Hours 2:00-4:00

Q&A

CONCUR TRAVEL - HELPFUL LINKS

Hold Control button and click link to open.

LINK TRAVEL POLICY & PROCEDURES

- [T&E](#) Travel guide, checklist, and FAQs
- [FORM](#) Forms library
- [INTL](#) International travel
- [GRP](#) Group & Guest travel
- [POL](#) Policies & Procedures
- [TAM](#) Travel Allowance & Mileage

LINK CONCUR TRAINING

- [CONC](#) Concur instruction pdfs & training videos
- [HELP](#) Submit Help Ticket for 1:1 assistance
- [OFC](#) Office Hours for weekly drop-in Q&A
- [WEB](#) Webinar registration for deep-dive training

CONTACTS

World Travel (877) 602-4950
uncch_travel@worldtravelinc.com

travel_team@unc.edu

controller@unc.edu

Week 1: Travel Requests

FREQUENTLY ASKED QUESTIONS

1. **Why do I need to create a Travel Request?** For departmental pre-approval of the trip, and for their budgeting purposes. It is only an estimate and does not encumber any funds. You should create this as soon as you know you will be travelling.
2. **What is the difference between Request and Report?** The Request is just for informational purposes, while the Report is the actual transactions that occurred.
3. **How do I know what documents are required?** The Finance website <https://finance.unc.edu/services/travel/> has guidelines and FAQs. In the Forms Library <https://finance.unc.edu/policies-procedures-and-forms/forms-library/> scroll down to the bottom for Travel (1500) and Expenses (1200).
4. **What is a cost comparison for, and how do I get one?** It is a flight or hotel quote that the travel team requires. There is a QRC available or contact the travel team, or call World Travel. For example, if you are driving a long way vs flying, you'll need to attach a flight comparison to give the approvers an idea of what it would have cost to fly vs drive. You'll be reimbursed mileage up to the airfare cost.
 - o The other common example is staying at an Airbnb or apartment for long term trips, you would submit two quotes for nearby hotels in addition to the actual cost of the Airbnb, to show the cost savings.

Week 1: Travel Requests

FREQUENTLY ASKED QUESTIONS

5. **When can I book travel?** As soon as the travel request is approved. If you need an exception, email the travel team.
6. **When will my request be approved?** The process can take several weeks as it requires *at least 2 approvals* by your department designated and business office approvers. Additional approvers will be added for federally funded trips (OSR approval) and international travel. The final step is review and approval by the Travel Team.
7. **Do I have to book through Concur?** Yes. However, there are a couple of exceptions.
8. **Can I book the hotel through the conference site?** Yes, UNC prefers that you book your conference hotel through the conference website link, as they have a block of rooms reserved at a reduced rate. No cost comparison is required.
9. **Can I book an apartment or Airbnb instead?** Yes, as mentioned before, for long-terms trips it can be more cost-effective to book an apartment or Airbnb instead of a hotel. The two hotel cost comparison quotes will reflect this and should be attached to the Travel Request.
10. **When do I use T&E card vs P-Card vs personal credit/debit card?** The Payment Card Services site <https://finance.unc.edu/services/card-services/> has a reference document. There is also a pdf showing how to pay expenses by traveler type (faculty staff vs students or guests).