

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 3: Expense Reports – Part II

FREQUENTLY ASKED QUESTIONS

1. How do I itemize a hotel? Restaurant?
2. How do I mark an expense as personal?
3. How do I clear alerts?
4. How do I correct a Request/Report that was returned to me?
5. What if I don't have the receipt?
6. What do I do with duplicate expenses? Combine or Delete depending

TIPS

- T&E Card transactions cannot be deleted from Concur; they must be submitted on a report and processed
- Create ONE monthly report for all NON-OVERNIGHT TRAVEL expenses i.e. mileage, business meals, and fees for Virtual Conferences
 - These do not require Travel Requests. Each expense will have its own Business Purpose and you can allocate to different CFS as needed
 - Reminder there is no meal per diem for single day travel

Week 3: Expense Reports – Part II

FREQUENTLY ASKED QUESTIONS

1. **How do I itemize a hotel? Restaurant?** Access the *Concur Step by Step Guide* pg 134 on our [website](#).
2. **How do I mark an expense as personal?** Use expense type Non-Reimbursable / Personal for all or a portion of an expense. Must itemize to isolate the amount that is personal vs. University pay.
3. **How do I clear alerts?** Must look at each one and address, either filling in missing fields, adding attachments, or adding comments of explanation. If you are unsure what needs to be done, please submit a concur help ticket help.unc.edu.
4. **How do I correct a Request/Report that was returned to me?** Same as #3.
5. **What if I don't have the receipt?** Click on Manage Receipts / Missing Receipt and follow the prompts. You can do this for multiple missing receipts simultaneously.

6. What do I do with duplicate expenses? It depends on the situation.

- If you have the charge that shows paid by **University Travel Card** or **Airfare Direct Bill** and you also have a line for the same date and amount with a receipt, check the two boxes to the far left of both lines and click Combine button.

<input type="checkbox"/>	Alerts↑↓	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↑↓	Amount↑↓	Requested↑↓	
<input checked="" type="checkbox"/>				Airfare Direct Bill	Airfare Reservation	British Airways Charlotte, North Carolina	05/21/2024	\$1,382.70	\$1,382.70 Itemized	...
<input checked="" type="checkbox"/>				*PLEASE SELECT PAYMENT TYPE	Airfare	British Airways Amsterdam, NETHERLANDS	05/21/2024	\$1,382.70	\$1,382.70	...

- If it says **pending card transaction**, wait a few days for it to finish fully merging to concur. It will automatically change to University Travel Card and that is when it can be added to a report for processing.

Receipt	Payment Type↑↓	Expense Source	Expense Type↑↓	Vendor Details↑↓	Date↑↓	Amount↑↓
	Pending Card Transaction	Expenselt	Food & Beverage 8 or less	Himalayan Bank Ltd	08/14/2024	INR 4,725.00

- If it says **please select payment type**, it is just a receipt and you need to wait for the corresponding card transaction to enter concur. Or if you already submitted the card transaction, then this is an extra receipt that can be deleted. Or it could be the receipt for an item you paid for out of pocket and you need to change the payment type.

Week 3: Expense Reports – Part II

TIPS

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- Create ONE monthly report for all NON-OVERNIGHT TRAVEL expenses i.e. mileage, business meals, and fees for Virtual Conferences .
 - These do not require Travel Requests. Each expense will have its own Business Purpose* and you can **allocate** to different CFS as needed. Refer to the *Concur Step by Step Guide* pg 128 on our [website](#).
 - Reminder there is no meal per diem for single day travel.

The screenshot shows the 'Allocate' form in Concur. The 'Allocate' button is highlighted with a red box. The form includes the following fields:

- Expense Type ***: Airfare
- Transaction Date**: 08/07/2024
- Traveler Type ***: Faculty/Staff
- Trip Type ***: Out-of-State
- Report/Trip Purpose ***: Conference

The 'Report/Trip Purpose' field is also highlighted with a red box. A red asterisk indicates that the Expense Type, Traveler Type, Trip Type, and Report/Trip Purpose fields are required.

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

Web Links & Contact Information for Forms, Policies & procedures for UNCCH

- Concur Home Page – link to support, concur login, quick reference guides, training materials and all things Concur related

<https://finance.unc.edu/services/travel/concur/>

- Concur Support – to assist with navigation and functionality of Concur

<https://go.unc.edu/concursupport>

- For policy related questions, flight cost comparisons status of expense report send email to Travel Team travel_team@unc.edu
- For assistance with booking air, car rental or hotel and obtain cost comparisons contact WorldTravel at (877) 602-4950 or email uncch_travel@worldtravelinc.com

- Travel Forms & Policies

<https://finance.unc.edu/policies-procedures-and-forms/forms-libr>

- Travel & Expense Card – frequent used forms, policies, application and handbook guide

<https://finance.unc.edu/services/card-services/travel-expense-card/>

- PCard and University Travel Card questions can be emailed to pcard@unc.edu or travelcard@unc.edu as appropriate

- UNC Global Affairs for International Travel information & forms

<https://global.unc.edu/preparing-for-international-travel/>

- UNC Equal Opportunity & Compliance to request a travel medical accommodation

<https://eoc.unc.edu>

- Locate current Federal GSA (Government) Per Diem Rates

<https://www.gsa.gov/travel/plan-book/per-diem-rates>

- Locate International (Foreign) Per Diem Rates

https://aoprals.state.gov/web920/per_diem.asp