

# Concur Support Virtual Office Hours

---

Presented by:

Kathy Angel (Concur Support Desk Associate)

&

Christina DeMoss (Concur Support Desk Associate)



# 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! It is better to have it and not need it, than to need it and not have it.
- Submit requests at least 2 weeks prior to domestic travel and 3 weeks for international travel.
- Requests will go through AT LEAST two steps of approval:
  - 1<sup>st</sup> Dept. Designated Approver
  - 2<sup>nd</sup> Business Office Approver
- If you need to make changes to your request after submittal, you can recall it.

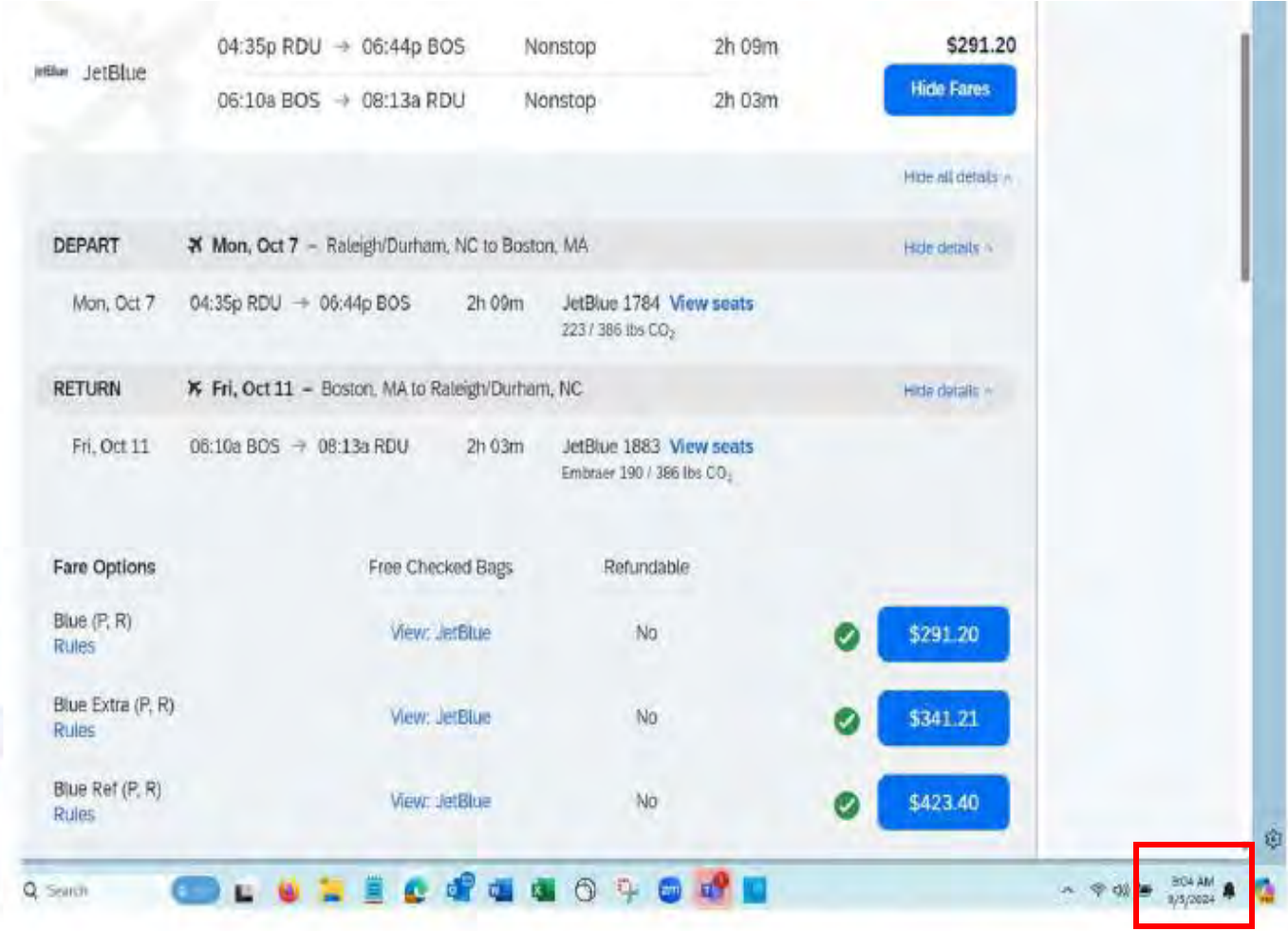
1. **Why do I need to create a Travel Request?** For departmental pre-approval of the trip, and for their budgeting purposes. It is only an estimate and does not encumber any funds. You should create this as soon as you know you will be travelling. **TIP:** you'll need to get your estimates for airfare and hotel before you begin entering the Request.
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. **TIP:** Add expense lines for everything you think you might need, even if you end up not using it on the expense report later. **TIP:** Submit at least 2 weeks prior to domestic travel and 3 weeks prior to international travel. **TIP:** if you need to make changes to the request after you submit it, you can RECALL it, but it will need to start at the beginning of the approval process again.
3. **How do I know what documents are required?** The [Finance website](#) has guidelines and FAQs. In the [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 over 750 miles round trip, 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 cost of the airfare.
  - 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.

# Cost Comparison Example

In Concur search for the airfare dates that would be just for the business days.

**EX: 10/7 to 10/11 airfare Raleigh to Boston the cost would be \$291.20.**

*Be sure to capture the date quote is taken. Screenshot should include bottom right of screen. Or print to PDF will automatically include it in top left.*





Then run a second airfare search with the dates that would be for business plus personal dates. It must be the same outgoing flight.

**EX: 10/7 to 10/13 airfare Raleigh to Boston the cost would be \$426.20.**

**The cost difference is \$135.00 more, which will need to be itemized out and marked as Personal in the expense report.**

*Attach both quotes to the travel request and again on the expense report.*

The screenshot displays a flight search interface with the following details:

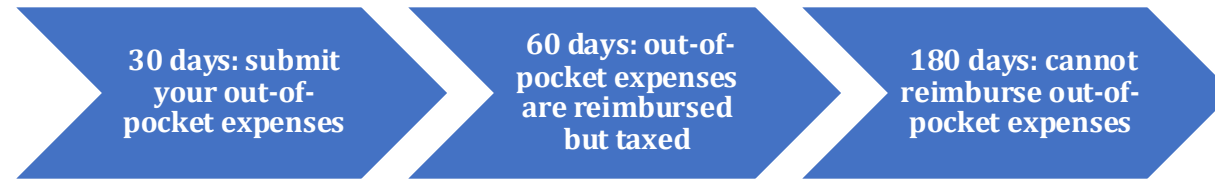
- Search Criteria:**
  - Origin: RDU - Raleigh/Durham Airport - Raleigh/Durham, NC
  - Destination: BOS - Boston Logan Intl Airport - Boston, MA
  - Depart Date: 10/07/2024, Time: 12:00 pm
  - Return Date: 10/13/2024, Time: 12:00 pm
  - Search by: Economy class, Schedule
- Selected Fare:**
  - Carrier: JetBlue
  - Outgoing: 04:35p RDU → 06:44p BOS, Nonstop, 2h 09m, JetBlue 1784, 223 / 386 lbs CO<sub>2</sub>
  - Return: 08:55p BOS → 11:07p RDU, Nonstop, 2h 12m, JetBlue 783, 223 / 386 lbs CO<sub>2</sub>
  - Fare Options: Free Checked Bags, Refundable
  - Total Cost: \$426.20

Note: If you must travel by car because you are transporting equipment or other people, include that information in the header comments. The mileage will still be calculated at the reduced rate, but the airfare comparison is not required.

- 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. You can see the approval history in a report under Report Details > Report Timeline. If the report is pending review by the travel team, email them directly to inquire about status and ETA.
- 7. Do I have to book through Concur?** Yes. However, there are a couple of exceptions: see #8 and #9.
- 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. Attach a copy of the conference details and agenda to the travel request and again on the expense report.
- 9. Can I book an apartment or Airbnb instead?** Yes, for long-term 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 and again on the expense report.
- 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).

# News & Alerts: Changes in the past six months

- [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. Out-of-pocket expenses cannot be submitted for reimbursement after 180 days.
  - These started coming out in the May payroll. To request a review and dispute please email the Controller's office at [controller@unc.edu](mailto: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 recommends you attach copy of the conference agenda to the travel request and again on the expense report for approver reference.



# Concur Monthly In-Depth Webinar

This webinar is geared towards Business Officers, Accounting Technicians, Executive and Administrative Support and anyone approving Travel Requests or Expense Reports.

Please [register in Carolina Talent](#).

To find dates please visit our [webpage](#).



# 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](mailto:travel_team@unc.edu)

Please contact WorldTravel at (877) 602-4950 or  
[uncch\\_travel@worldtravelinc.com](mailto: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](https://finance.unc.edu/services/travel)

# Concur Support Virtual Office Hours

---

Please raise your hand or  
enter your question in the chat box.



# CONCUR TRAVEL - HELPFUL LINKS

Hold Control button and click link to open.

| LINK                    | TRAVEL POLICY & PROCEDURES        |
|-------------------------|-----------------------------------|
| <a href="#">T&amp;E</a> | Travel guide, checklist, and FAQs |
| <a href="#">FORM</a>    | Forms library                     |
| <a href="#">INTL</a>    | International travel              |
| <a href="#">GRP</a>     | Group & Guest travel              |
| <a href="#">POL</a>     | Policies & Procedures             |
| <a href="#">TAM</a>     | Travel Allowance & Mileage        |

| LINK                 | CONCUR TRAINING                             |
|----------------------|---|
| <a href="#">CONC</a> | Concur instruction pdfs & training videos   |
| <a href="#">HELP</a> | Submit Help Ticket for 1:1 assistance       |
| <a href="#">OFC</a>  | Office Hours for weekly drop-in Q&A         |
| <a href="#">WEB</a>  | Webinar registration for deep-dive training |

## CONTACTS

World Travel (877) 602-4950  
[uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)

[travel\\_team@unc.edu](mailto:travel_team@unc.edu)

[controller@unc.edu](mailto:controller@unc.edu)

[Travel Card and Payment Services](#) website.

\* If a traveler has at least two overnight trips per year, they should request a University Travel Card.

## **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](mailto: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](mailto: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](mailto:pcard@unc.edu) or [travelcard@unc.edu](mailto: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](https://aoprals.state.gov/web920/per_diem.asp)