

Concur Support Virtual Office Hours

Presented by:

Christina DeMoss (Concur Support Desk Associate)

&

Kimberli Spence (Concur Support Desk Supervisor)

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 4: Navigation & Follow up

FREQUENTLY ASKED QUESTIONS

1. Where should I look to get estimated costs of airfare and hotel?
2. How do I create/get a cost comparison?
3. How do I see my older requests and reports?
4. Why am I getting email reminders when I already submitted expense report?
5. How can I find if I already submitted an expense? Card Transactions
6. When will Report be approved? Report Timeline
7. How much is my reimbursement? Report Totals
8. When & how will I get paid? Report Payments

TIPS

- Cost comparisons can be obtained on concur, from travel team, or World Travel. If needed in arrears, ask World Travel.
- Check our [website](#) for policy, procedures, forms, and training documents/videos.
- Before a trip, use the [checklist](#) to make sure you are prepared with approvals and correct documents.
- Reminder to submit (1) travel request, (2) pre-trip expense report, and (3) post-trip expense report.
- Put all one-day expenses on one report for a calendar month.

1. How do I get estimated costs of airfare and hotel? You can call World Travel, but it is just as easy to run a trip search in Concur and just not save it. Airfare will require you walk through the options for non-stop or layover, times of day options, and pricing options. You'll need to choose a departure flight before you will see the options for the return flights.

For Hotel estimates run a Concur search for the city and dates. It will display the anticipated per diem rates for Lodging, Meals, and Incidentals which it gets from the government [GSA site](#). For University purposes add another 50% to get the maximum amount allowed for the nightly room rate.

The screenshot displays three panels from the Concur system. The 'Trip Search' panel shows a 'Hotel Search' section with check-in and check-out dates of 10/07/2024 and 10/11/2024, a search radius of 5 miles from an airport, and a selected location of 'BOS - Boston Logan Intl Airport - Boston, MA'. The 'Trip Summary' panel shows a 'Select a Hotel' section with 4 nights, location 'Boston Logan Intl Airport, Boston, MA', and check-in/out dates of 10/07/2024 and 10/11/2024. The 'Hotel Per Diem Locations' panel shows search criteria for 'United States (US)', 'Massachusetts (MA)', and 'Boston -- Suffolk County'. Below this, a table displays per diem rates: Lodging Rate (\$322), Meals Rate (\$74), and Incidentals Rate (\$5). The Lodging Rate cell is highlighted with a red border.

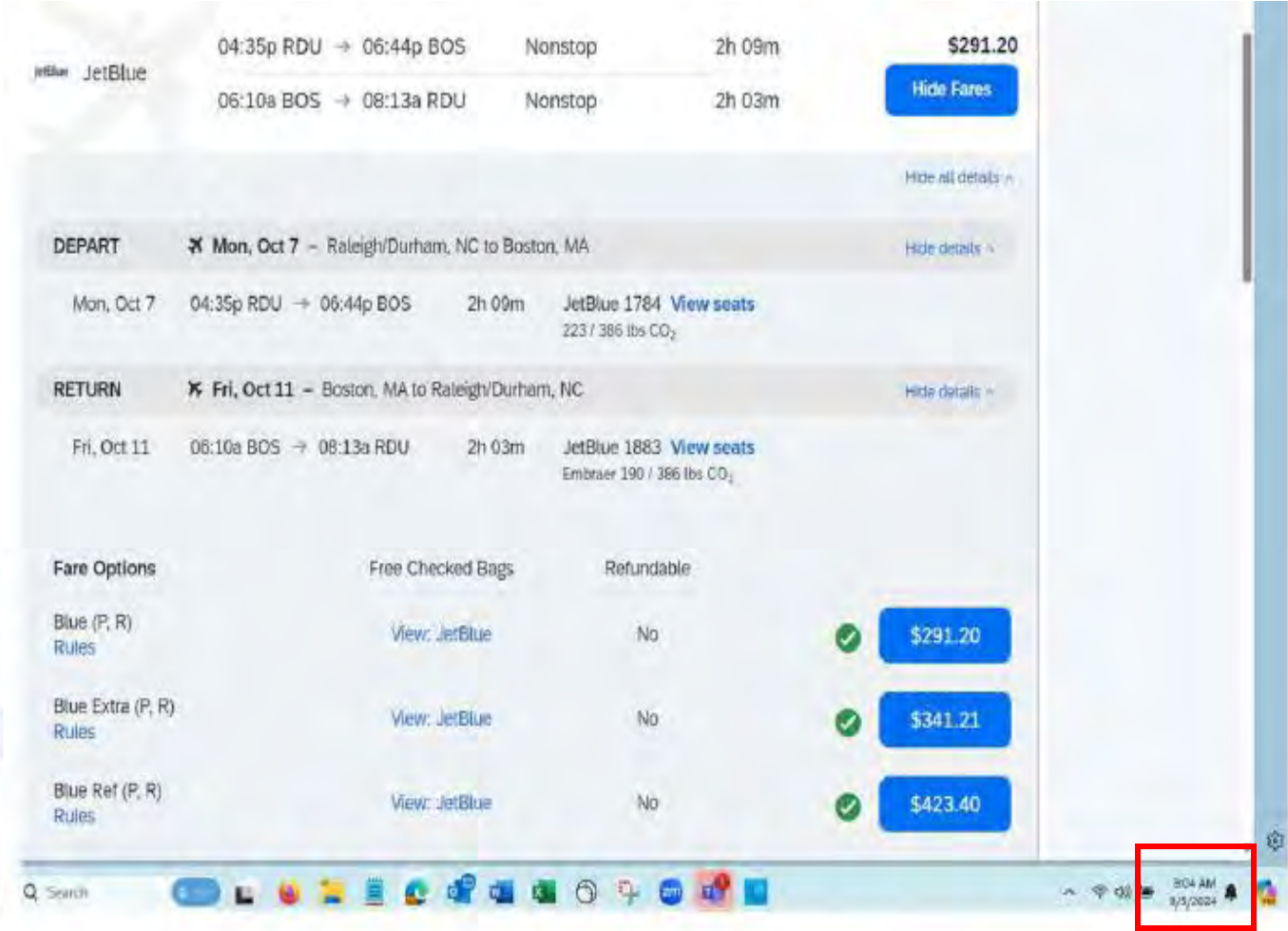
Lodging Rate	Meals Rate	Incidentals Rate
\$ 322	\$ 74	\$ 5

2. How do I get a cost comparison?

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.

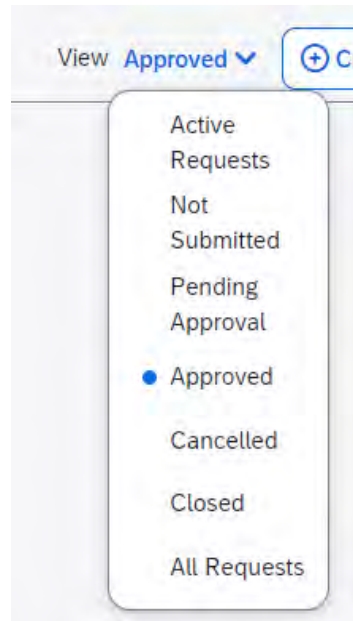
Attach both quotes to the travel request and again on the expense report.

The screenshot displays a flight search interface. On the left, the search criteria are: Origin: RDU - Raleigh/Durham Airport - Raleigh/Durham, NC; Destination: BOS - Boston Logan Intl Airport - Boston, MA; Departure Date: 10/07/2024; Departure Time: 12:00 pm; Return Date: 10/13/2024; Return Time: 12:00 pm; Search by: Schedule. The 'Selected Fare' section shows a round trip on JetBlue for \$426.20. The departure flight is on Monday, Oct 7, from RDU to BOS (04:35p to 06:44p) on JetBlue 1784, lasting 2h 09m. The return flight is on Sunday, Oct 13, from BOS to RDU (08:55p to 11:07p) on JetBlue 783, lasting 2h 12m. The fare includes free checked bags and is refundable. The total cost is \$426.20, with a 'Remove' button and a 'Hide Fares' button.

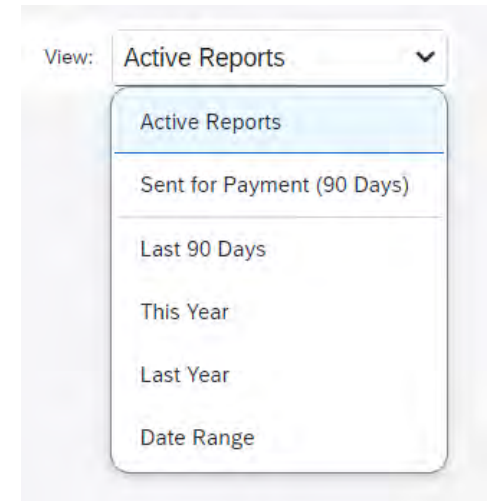
Note: If you must travel by car because you are transporting equipment or other people, include that information in the header comments. The mileage will still be calculated at the reduced rate, but the airfare comparison is not required.

3. How do I see my older requests? Change the view (located right side of screen) and click the drop-down menu.

You can select All Requests, Approved, Not Submitted, etc.



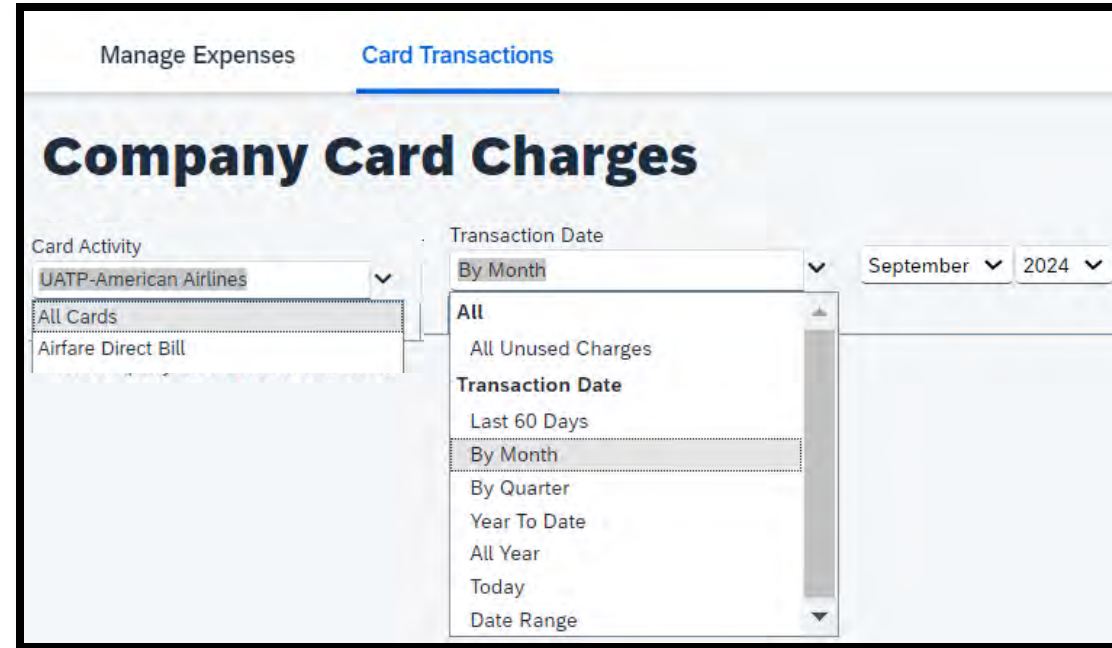
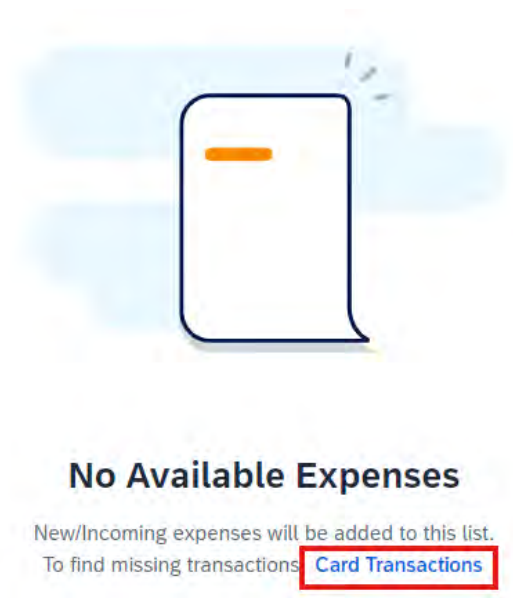
Older reports? Change the view to select the time range that suits your needs.



4. Why am I getting email reminders when I already submitted the expense report? There is an item that still needs to be addressed. Examples:

- You have an active travel request that doesn't have any expenses associated with it.
- You have an outstanding transaction that needs to be submitted for reimbursement.

5. How can I find if I already submitted an expense? Card Transactions feature. You can search by card and timeframe.

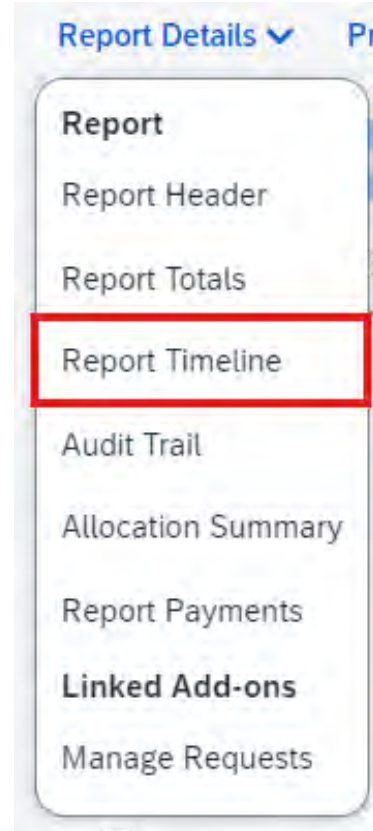


6. When will the Report be approved?

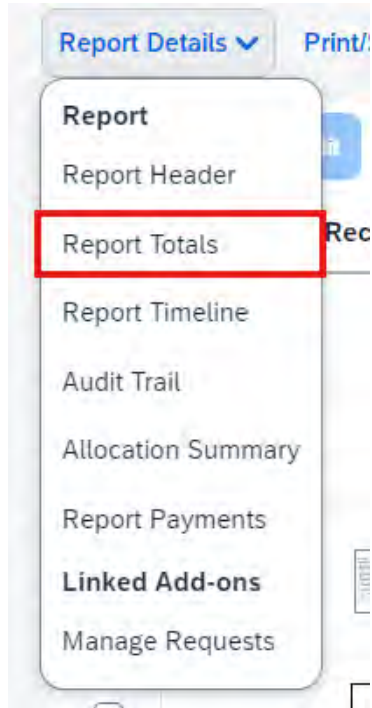
Report Details > Report Timeline will show where it is in the approval process.

For each report there are at least two approvals required at the dept level. Additional approval steps are added if the CFS includes federal funding (OSR), international travel, or if your dept requires your supervisor's approval. If more than one dept is being charged, then approvers from the second dept will be included too.

If it is in the travel team queue, please email travel_team@unc.edu for further status inquiry.



7. How much is my reimbursement? **Report Details > Report Totals** will show a breakdown of how much will be paid to the T&E card balance and to the traveler. It also shows if you owe anything to the University for items marked as personal.



A screenshot of a 'Report Totals' window. The window title is 'Report Totals' with a close button (X) in the top right corner. The content is organized into sections and a summary table.

Company Payments
\$2,018.93
Employee


Employee Payments
\$0.00
Company

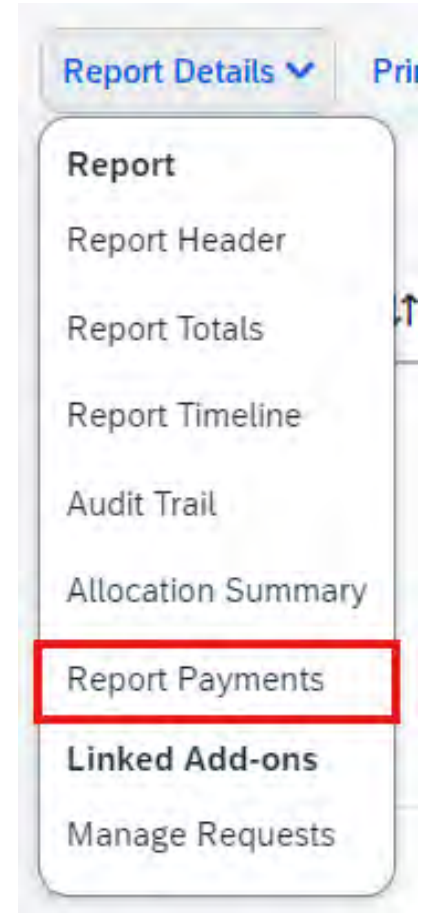
Amount Total: \$2,252.00	Due Employee: \$2,018.93	Owed Company: \$0.00
Less Personal Amount: \$233.07		
Requested Amount: \$2,018.93	Total Paid By Company: \$2,018.93	Total Owed By Employee: \$0.00

A 'Close' button is located in the bottom right corner of the window.

8. How & when will I get paid? If you have a bank account set up with the University payroll, your reimbursement will be direct deposited (ACH). If not, your funds will be mailed via paper check to the address on file in the campus [Directory](#).

To see an estimated date when it will be paid, click **Report Details > Report Payments**. If there is no date listed yet, it may be queued for processing but not yet initiated, so check it again in a day or two.

Payment Date↓↕	Import Run Number	Check/EFT	Payment To↓↑	Amount↓↑
07/12/2024	47710	0000686705		\$351.20



June Expenses (06/01/2024) \$2,725.86

Sent for Payment

Report Number: D2Q0KF

Sent for payment indicates payment was sent to Travel Card/Airfare Direct Bill.

Dataverse Community Meeting \$2,510.79

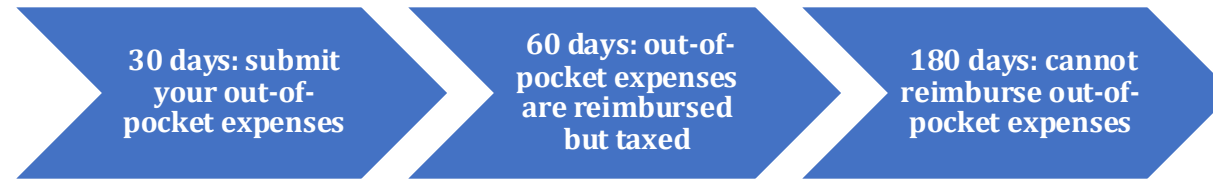
Payment Confirmed

Report Number: 6B0AAK

Payment Confirmed indicates personal reimbursement has been paid to you.

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



- [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.
- [Daily Allowance](#): Best practice is to claim daily allowance in your post-trip report that will contain your hotel/non hotel lodging expenses.

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

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 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

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

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