

Concur Business Office Webinar

Presented by:

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&

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With Guest Speaker:

Rebecca Spanos (Director of Travel & Payment Card Services)

In this Webinar we will go over:

News from Travel Team

Travel Card Dept. Q&As

Travel Requests

Travel Profile

Expense Reports

News from Travel Team

- All Non-Hotel Lodging Authorization requests will be submitted via TDX by submitting a service ticket to **Travel Services Team**
 - Effective 1/29: Communication and guidance to follow
- All communication regarding additional information/documentation needed for Concur expense reports will be streamlined via TDX for the **Travel Services Team**
 - Effective 1/29: Communication and guidance to follow

Electronic Travel Authorization Requirement for UK Travel

- **Effective Jan. 8, 2025**, travel to the United Kingdom will require the completion of an [Electronic Travel Authorization \(ETA\)](#). This includes travel with connections in the UK, even if you are not going through UK border control. This requirement applies to all visitors to the UK, except British or Irish citizens or those traveling on a Visa.
- To obtain an ETA, you must complete an online application and be approved before your trip. Once an application is submitted, a decision is usually received within three business days. An ETA costs £10 and may be paid for on your T&E Card or out of pocket and submitted for reimbursement. An approved ETA will be valid for two years or until the traveler's passport expires, whichever comes first. Upon approval, the ETA will be digitally linked to your passport.
- To apply, please download the UK ETA app or [apply online](#).

Travel Mileage Increase 2025

- **Effective Jan. 1, 2025**, the Internal Revenue Service (IRS) has established a new mileage rate for 2025. When a personal vehicle must be used, the allowable business standard mileage rate has increased to **70 cents per mile**.
- Per [1501.4 – Procedure on Ground Transportation Expenses Including Mileage Rates](#), mileage reimbursements up to 350 miles (round-trip) are reimbursed at the full IRS rate. For trips that exceed 350 miles, mileage above the first 350 miles is reimbursed at fifty percent (50%) of the full rate. As a reminder, this procedure applies to all travelers, including faculty, staff, students, guests, study subjects, etc.
- In order for the reimbursement amount to be accurately calculated in Concur and Web Travel, users must enter round-trip mileage as one expense entry.
- **University employees are encouraged to use a state-owned vehicle or leased vehicle through Fleet Services.** When such a vehicle is not available, travelers should use the least expensive method of ground transportation to meet their business needs. This may require pricing out available options, such as renting a vehicle through the state's contract with [Enterprise Mobility](#) (Enterprise and National).

T&E Card Refresher Training Requirement

- Starting January 27, 2025, all active T&E Card accountholders at UNC will be required to complete refresher training every two years. For additional information, please review [Procedure 1505.4 on T&E Card Accountholder Refresher Training](#).
- T&E Card accountholders will be automatically enrolled in the refresher training through Carolina Talent. The training must be completed within 90 days of assignment. Accountholders will receive email notifications - one when the training is assigned, another 45 days before the due date, and a final reminder 10 days out.
- **Failure to complete the training within 90 days will result in temporary suspension of the T&E Card until the training is finished. Additionally, accountholders will be unable to submit for out-of-pocket reimbursement of T&E Card purchases during the suspension period.**
 - If you have any questions or concerns, please contact travelcard@unc.edu.
- Campus communication went out 1/13 to ALL business manager and campus unit finance leads.

Travel & Payment Card Services

1. When to use T&E card vs. P-Card vs. Personal card for travel? Please review the [Paying for Travel Expenses by Traveler Type](#)
2. How do I know when it's considered Group Travel? If you're paying for group lodging/transportation for multiple travelers on ONE invoice
 - How and where do I send it? Email completed form to travelcard@unc.edu and attach to your expense report
 - Where can I find it? You can find form 1501.6.2f [Group Travel Request Form](#)
3. When do I use the Non-Hotel Lodging Authorization Form? If you're booking Airbnb, VRBO, hostel, etc. and NOT a traditional hotel
 - How and where do I send it? You would email the completed form and supporting documentation to Travel Services at travel_team@unc.edu and attach approval email and documentation to travel request and expense report
 - Where can I find it? You can find form 1501.6.1f [Non-Hotel Lodging Authorization Request Form](#)
 - **Effective 1/29 this form will be retired and a support ticket will need to be submitted to the Travel Services Team**

Travel & Payment Card Services

1. When do I use the Misuse & Abuse Form? If you've used your University T&E card for non-allowable charges. Reference policy [1502.2 Procedures for Using a Travel & Expense Card](#)
 - How and where do I send it? You must attach this to the expense report and emailed to the Travel Card Team at travelcard@unc.edu
 - Where can I find it? You can find form 1505.2.1rd on the [Travel & Expense Card Finance page](#)
2. Where do I find my PIN #? You can find this information in the [Global Card Access Manual](#) (start on pg 5)
3. When do I need a T&E Card Account Maintenance form? If an account holder leaves the University, transfers to a new dept., or no longer uses their T&E card.
 - You would complete and email this form: <https://finance.unc.edu/forms/1505-1-2f/> to the Travel Card team at travelcard@unc.edu

UNC FINANCE AND OPERATIONS Finance and Budget Travel & Payment Card Services

Travel & Expense Card Account Maintenance Form 1505.1.2f

Instructions: Email this completed form to travelcard@unc.edu. Mark the check box for each type of request; check all that apply.

Date:

Accountholder Name: Last 4-digits of T&E Card Number:

Cancel Card Account

Permanent Credit Limit Increase(s) (Select the amounts from the dropdown options.)
New Monthly Credit Limit:

Temporary Limit Increase (Provide a brief explanation for business purpose of the increase. Then enter the amounts.)
Justification for Increase:

Anticipated Start Date of Expense: Temporary Monthly Credit Limit: Anticipated End Date of Expenses:

Department Change: Old Department New Department

Email Change (For Bank of America Notifications.)

Phone Number Change

Billing Address Change
Street Address City State Zip Code

Name Change (A new card will be created.)
First Name Middle Name/Initial Last Name

Other (Please specify.)

Accountholder Signature Date

Business Manager/Department Head: First & Last Name Business Manager/Department Head Signature Date

Payment Type & When to Use T&E vs P-Card

Type of Expense	Permanent Employees	Temporary Employees (including postdocs)	Student Travel (including fellows, grad students, and residents) with Form	Guest Travel with Form	Form to Submit
Airfare*	T&E Card or Direct Bill Card	Direct Bill Card	CABS	CABS	Guests must be setup as vendor/supplier by submitting their W9 to A/P.
Conference Registration	T&E Card or P-Card	P-Card	P-Card	P-Card	Not Applicable
Lodging**	T&E Card or Out of Pocket (OOP)	OOP	T&E Card or P-Card***	P-Card	Guest Travel Pre-Approval Request Form or Student Travel Pre-Approval
Ground Transportation	T&E Card or OOP	OOP	T&E Card or P-Card***	P-Card	Guest Travel Pre-Approval Request Form or Student Travel Pre-Approval
Rental Car (including fuel expenses)	T&E Card or OOP	OOP	OOP	OOP	Not Applicable

*If paying for Airfare Block Space for group travel, a P-Card may be used to complete payment upon request. Please email pcard@unc.edu for assistance.

**If paying for group lodging for multiple travelers, the [Group Travel Request Form 1501.6.2f](#) should be completed and submitted to pcard@unc.edu or travelcard@unc.edu to request permission to use your card.

***If a student is traveling with a T&E Card account holder, the T&E Card may be used to pay for student lodging. If a student is not traveling with a T&E Card account holder, a P-Card may be used.

Links to documents:

[Payment by Traveler Type](#)

[When to Use a T&E Card vs a P-Card](#)

[Forms Library](#)

FINANCE AND OPERATIONS
When to Use a T&E Card Versus a P-Card

Payment Card Services

Use this chart to help understand when to use a T&E Card versus a P-Card. This document is a sample list of allowable charges and does not include all of the additional considerations when completing a purchase. Be sure to review the appropriate policies and guidebooks for further information.

Use a T&E Card for:	Use Either a T&E Card or a P-Card	Use a P-Card for:
<ul style="list-style-type: none"> • Business Meals, Catering, and Entertainment Expenses including alcohol** • Travel Expenses for the Accountholder, including: <ul style="list-style-type: none"> • Airfare • Lodging • Parking • Rental Vehicles and Ground Transportation • Gas for Rental Vehicles • Uber and Lyft • WIFI costs (if necessary for conducting business) 	<ul style="list-style-type: none"> • Business Meals, Catering, and Entertainment Expenses that do not include alcohol** • Conference Registrations*** • Passport and/or Visa Fees • Professional Membership Dues • Student Travel on Request • Zipcar 	<ul style="list-style-type: none"> • Advertising • Conference Calls • Copying/Framing/Photo Developing/Reprints • Credential Verification/Background Checks • Inventory Purchases • Medical License/DEA License • Newspaper/Magazine/Online Subscriptions • Postage/Shipping/Courier • Rentals** • Repairs from a vendor • Services from a vendor**** • State Contract purchases • Supplies (office/shop/IT/lab) • Utility (power/water/gas/cable) • Uber and Lyft for Clinical Trial Studies, only • Guest Travel on Request

* Alcohol must be allocated to an appropriate funding source as specified in Policy 1263 on University-related Business Entertainment Expenses.
 ** Purchases exceeding \$5,000 and/or which include a contract with terms and conditions, must be reviewed and approved by Procurement Services.
 *** Financial donation/gift component when registering for a conference or other event are personal expenses and are not allowed.
 **** While services from a corporation or proprietorship are allowable, services from a sole proprietor (or LLC) are not.

Non-Hotel Lodging Authorization & Group Travel Form

UNC FINANCE AND OPERATIONS
Finance
Travel & Expense Services

Non-Hotel Lodging Authorization Request Form 1501.6.1f

Approval for Lodging in a Third Party Establishment/Apartment Building

It is required that Travel Services authorize any request for Lodging in a Third Party Establishment **PRIOR** to your trip. For reference, please see [1501.6 - Procedure on Lodging Accommodations Policy](#). The following information is needed by Travel Services to make a determination of whether to approve the lodging reimbursement. Please email the completed form and supporting documentation to Travel Services at travel_team@unc.edu.

Traveler Name: _____ Traveler Phone: _____

Dates of Travel: From: _____ To: _____ Number of Nights: _____

Destination: _____
City & State

Purpose of Travel: _____

Requesting Department Name: _____ Requesting Department Number:

Department Contact Name: _____ Department Contact Phone: _____

Payment Type: _____

Traveler name(s) included in stay: _____

Is it a savings to rent the house/apartment rather than a hotel room? (Please show calculation and identify ALL state employees considered in calculation.) Attach documentation proving that the non-hotel lodging request is less expensive than hotel lodging. Include the number of stat employees who will be staying in the house/apartment in your justification. Attach two comparable hotel quotes to your justification.

Documentation: _____

Links to documents:

[Non-Hotel Lodging Authorization Form](#)

[Group Travel Request Form](#)

[Forms Library](#)

UNC FINANCE AND OPERATIONS
Finance and Budget
Payment Card Services

Group Travel Request Form 1501.6.2f

Instructions: If paying for group lodging for multiple travelers, submit this completed form to pcard@unc.edu or travelcard@unc.edu to obtain permission to use your P-Card or Travel and Expense (T&E) Card. Please attach additional sheet if needed to include more travelers.

Accountholder: _____ Card Type: _____ Last 4-digits of Card Number:

Date(s) of Travel: _____ through _____

Purpose of Travel: _____

Anticipated Expenses
Reasonable estimates are acceptable and please include an agenda if available.

Lodging Expenses: _____ Transportation Expenses: _____ Other Expenses: _____

Details of other anticipated expenses: _____

Justification for why group Payment is being allowed: _____

Names & Status of All Group Travelers


Traveler: _____ <small>First Name Last Name</small>	<input type="checkbox"/> Non University Affiliate	<input type="checkbox"/> Student	<input type="checkbox"/> Faculty/Staff
Traveler: _____ <small>First Name Last Name</small>	<input type="checkbox"/> Non University Affiliate	<input type="checkbox"/> Student	<input type="checkbox"/> Faculty/Staff
Traveler: _____ <small>First Name Last Name</small>	<input type="checkbox"/> Non University Affiliate	<input type="checkbox"/> Student	<input type="checkbox"/> Faculty/Staff
Traveler: _____ <small>First Name Last Name</small>	<input type="checkbox"/> Non University Affiliate	<input type="checkbox"/> Student	<input type="checkbox"/> Faculty/Staff

As the Accountholder, my signature below authorizes charges to my P-Card/T&E Card account for business-related lodging expenses, incurred during the dates of travel provided for the guests listed above.

Accountholder Signature: _____ Date: _____

Misuse & Abuse Form

- Please email the completed form to the Travel Card Team at travelcard@unc.edu
- Attach to expense report prior to submitting for reviewal/approval if self-reported

 FINANCE AND OPERATIONS
Finance and Budget
Travel & Payment Card Services

Travel and Expense Card Misuse/Abuse Notification - Form 1505.2.1RD

Instructions: Email this completed form to travelcard@unc.edu, to document Travel and Expense (T&E) Card misuse and/or abuse. For additional information regarding allowable and non-allowable T&E Card transactions view the [Procedures for Using a Travel & Expense Card 1505.2](#) This document may be filled out by the Accountholder or another member of the department.

Date of Notification: _____

Type of Infraction (select one from the dropdown): _____

Last 4-digits of T&E Card Number: Accountholder: _____
(First and Last Name)

Report ID or Report Number: _____

The following transaction(s) occurred on the University T&E Card:

Merchant	Date	Amount	Policy Infraction
1. _____	_____	_____	_____
2. _____	_____	_____	_____

As outlined in T&E Card policies and procedures, this type of transaction is not permissible on the University T&E Card. As a result, policy requires this letter of notification be issued. Should three or more misuse violations occur within a 12 month review period or audit review period, your T&E Card privileges may be suspended. Abuse violations may result in immediate cancellation of your T&E Card.

Per the T&E Card Accountholder Agreement Form, the Accountholder may be held personally liable for any funds misused with their card. Should you have any questions or concerns regarding this letter, the related transaction(s) listed, or if you are unsure if a purchase is allowed, contact the Travel Card Office at travelcard@unc.edu.

Comments or Further Action Required:

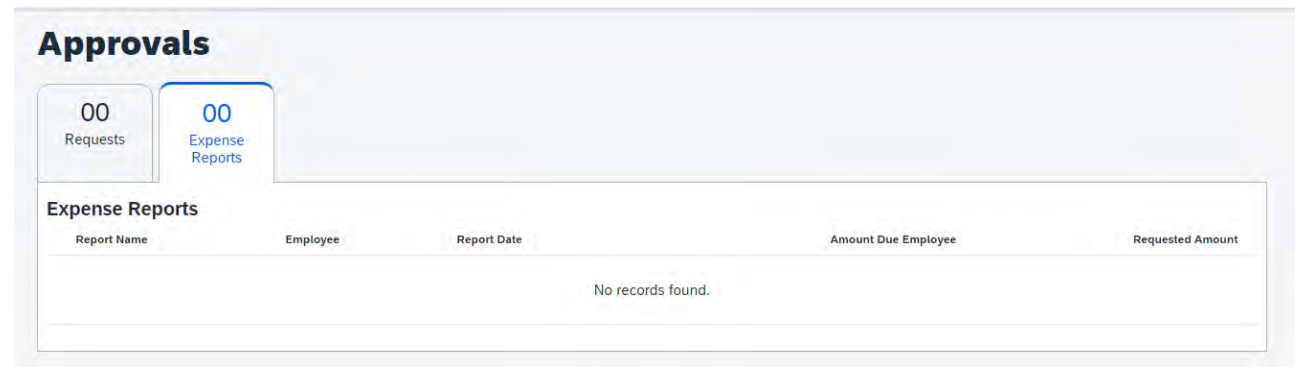
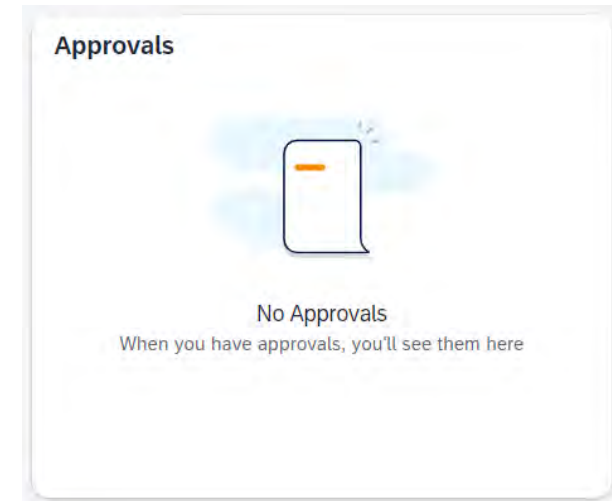
By signing below, I acknowledge that I have been duly informed of the findings outlined above and understand the circumstances of this notification.

Travel Team, Travel Card Services, & Concur Support

- When should I reach out to the Travel Team?
 - If your question is policy related, or are questioning the policies/steps for your trip
 - Ex. Unsure about flight cost comparison being required, questions about WebTravel, when reports will be processed, cash advances or non-hotel lodging
- When should I reach out to the Travel Card Team?
 - If your question is relating to the Travel & Expense card
 - Ex. Your card has been suspended, you suspect a fraudulent transaction, or you need to increase your spending limit for T&E card
- When should I reach out to the Concur Support Team?
 - If your question is about the navigation and functionality of Concur
 - Ex. How to create a travel request/expense report, resolving error messages, or uploading correct documentation

Travel Request/Expense Report Approvers

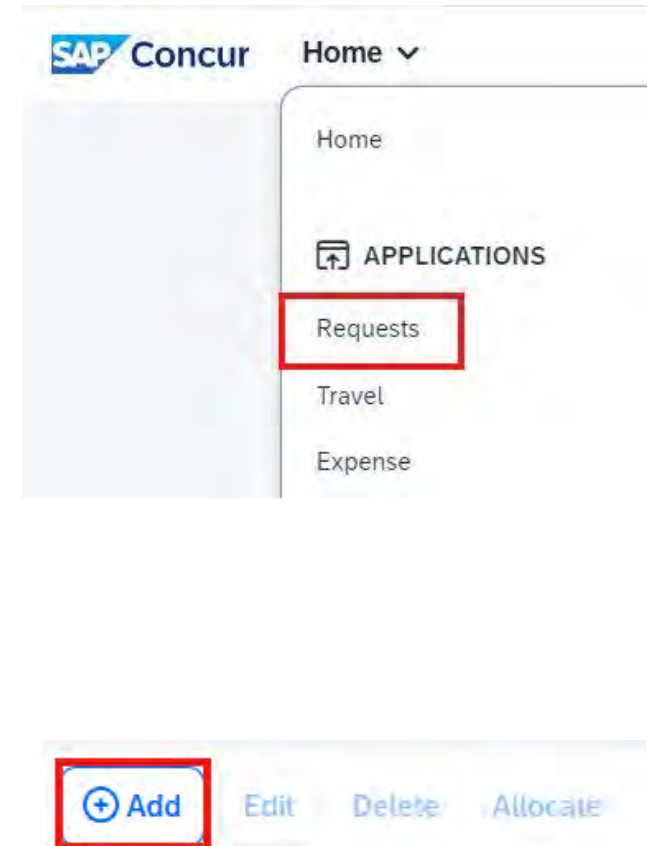
- Travel Request and Expense Report Approvers have three 10-day windows to review & approve
 - This will eventually time out and will be sent back to the traveler and will go through the workflow timeline again
- Please look at requests: if there's only airfare, reach out to traveler to confirm if this is the only estimated expense
- Please look at reports: if there's overnight travel/claiming daily allowance- look for attached travel request
 - Bank/credit card statements are not acceptable receipts



Approvals				
00 Requests	00 Expense Reports			
Expense Reports				
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
No records found.				

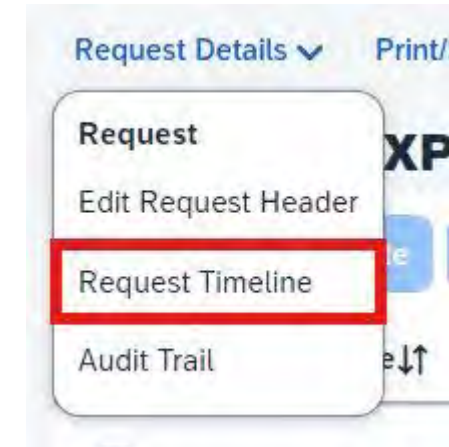
Travel Requests

- What is a travel request?
 - Pre-authorization required for all overnight travel, or day travel which includes airfare, for University Faculty and Staff
 - Not required for day trips with mileage or meeting meals
- What expected expenses need to be on a travel request?
 - “Big 5”: airfare, hotel/lodging, conference/event registration fees, daily allowance (per diem), & ground transportation
- When should I submit my travel request?
 - We recommend AT LEAST 2 weeks prior for domestic travel, 3 weeks prior to international travel



Travel Requests cont.

- Approval Workflow Timeline:
 - 1st Default/Supervisor if set up or Dept. Designated Approver
 - 2nd Business Office Approver
 - *3rd/4th/5th Office of Sponsored Programs (OSP), Export Control, UNC Global
- Can I change my travel request after it's been approved?
 - Yes, if the dates of travel are in the future, and if it's not linked to an expense report - It must go through approval workflow again
- My travel request is approved, can I book my trip?
 - Yes, once your request is fully approved you can: book flights, hotel deposit, rental car reservation, etc.
 - When booking flights (in Concur or with World Travel) you will need the 4-digit Request ID



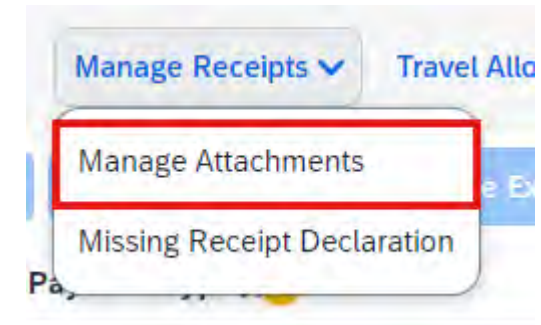
Concur Conference 2025 \$830.00

Not Submitted | Request ID: CXXL

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

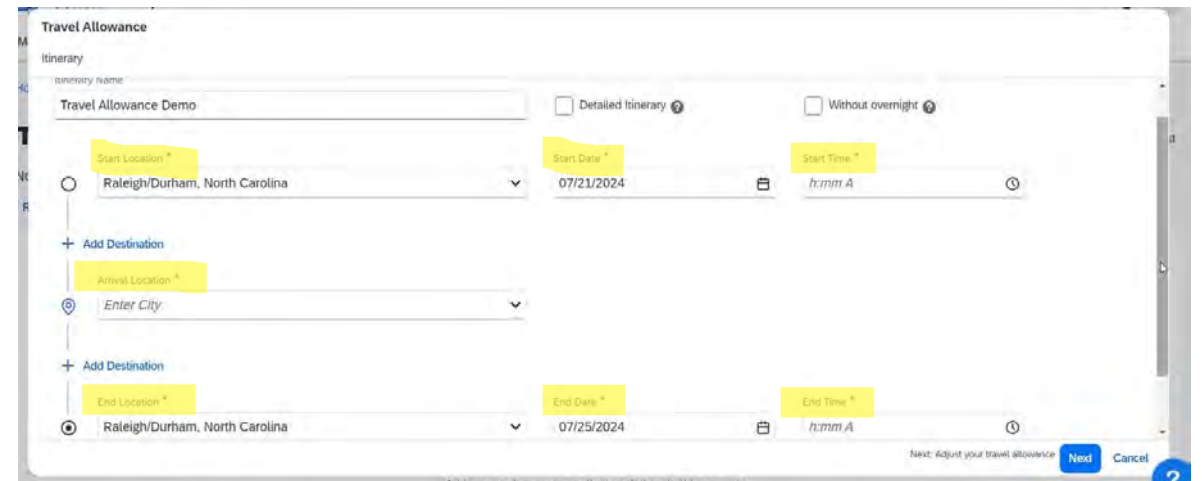
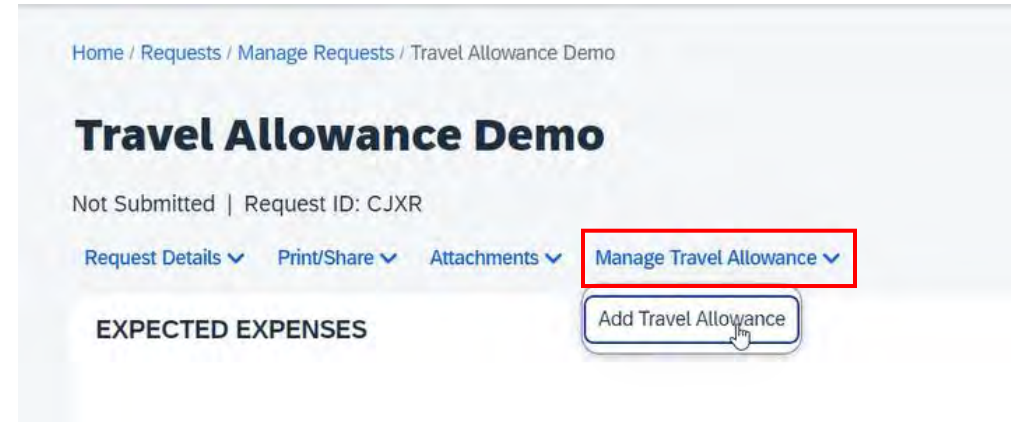
Travel Requests – Additional Info

- What documentation is needed?
- [International Travel Approval Form](#) – when travelling international for University-related business, you will complete & attach this form and will be approved by UNC Global Affairs
- Third-party lodging (Airbnb, VRBO, rental) – complete and submit [1501.6 Non-Hotel Lodging Authorization Request](#) to travel_team@unc.edu with two hotel cost comparisons in the area or near your event
 - This approval form & approval email is to be attached to both request & expense report
 - Best practice is to add your conference/seminar event agenda to Travel Request



Daily Allowance

- When creating a Travel Request for overnight travel, users will add Daily Allowance to their Request via the Manage Travel Allowance dropdown
- Some itinerary information will pre-populate from the Request Header, user will update or add information to other required fields



Daily Allowance

- Adjustments page will allow user to exclude meals from per diem calculation and show totals
- Allowance Limit will show allowable hotel rate for destination

Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: **Reimbursement Details** Show Filters

Date	Location	Rate Type	Information	Rate Amount	Factor	Adjustments	Calculated Amount	Allowance Limit	Reimbursement Amount
Sun, 07/21/2024	Portland, UNITED STATES	Meals		\$99.00	0.75	\$-79.00	\$15.25	\$0.00	\$15.25
	Portland, UNITED STATES	Lodging	Over Limit Tracking	\$229.00	1.5	\$0.00	\$343.50	\$343.50	\$0.00
	Portland, UNITED STATES	Incidentals		\$8.00	0.75	\$0.00	\$3.75	\$0.00	\$3.75
							\$343.50		\$19.00
Mon, 07/22/2024	Portland, UNITED STATES	Meals		\$09.00	1	\$-20.00	\$29.00	\$0.00	\$29.00
	Portland, UNITED STATES	Lodging	Over Limit Tracking	\$229.00	1.5	\$0.00	\$343.50	\$343.50	\$0.00
	Portland, UNITED STATES	Incidentals		\$5.00	1	\$0.00	\$5.00	\$0.00	\$5.00
							\$343.50		\$34.00
Tue, 07/23/2024	Portland, UNITED STATES	Meals		\$95.00	1	\$-50.00	\$0.00	\$0.00	\$0.00
	Portland, UNITED STATES	Lodging	Over Limit Tracking	\$229.00	1.5	\$0.00	\$343.50	\$343.50	\$0.00
	Portland, UNITED STATES	Incidentals		\$5.00	1	\$0.00	\$5.00	\$0.00	\$5.00
							\$343.50		\$5.00
							Total: \$1,374.00		Total: \$140.00

Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: **Adjustments** Show Filters

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Allowance Limit	Reimbursement Amount
Dates: 5							
Sun, 07/21/2024 Portland, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$343.50	\$48.00
Mon, 07/22/2024 Portland, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$343.50	\$64.00
Tue, 07/23/2024 Portland, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$343.50	\$64.00
Wed, 07/24/2024 Portland, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$343.50	\$64.00
Thu, 07/25/2024 Portland, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$48.00
						Total: \$1,374.00	Total: \$288.00

- Reimbursement Details page will show the Rates, Adjustments, Calculations and Reimbursement Amounts for each day

Daily Allowance

- When an Expense Report is created from an approved Travel Request, the Daily Allowance expenses will automatically populate on the report.

CHELF \$25.00
Not Submitted | Report Number: SSMK00

REQUEST
Approved
\$668.50

Report Details | Print/Share | Manage Receipts | Travel Allowance

Expenses View: Standard

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Daily Allowance (Incidentals)	Washington, District of Columbia	10/17/2024	\$3.75
<input type="checkbox"/>	Out of Pocket	Daily Allowance	Washington, District of Columbia	10/17/2024	\$16.25
<input type="checkbox"/>	Out of Pocket	Daily Allowance	Washington, District of Columbia	10/16/2024	\$1.25
<input type="checkbox"/>	Out of Pocket	Daily Allowance (Incidentals)	Washington, District of Columbia	10/16/2024	\$3.75
					\$25.00

CHELF \$138.00
Not Submitted | Report Number: SSMK00

REQUEST
Approved
\$668.50

Report Details | Print/Share | Manage Receipts | Travel Allowance

Expenses View: Standard

Alerts	Receipt	Payment Type	Expense Type
<input type="checkbox"/>		Out of Pocket	Daily Allowance (Incidentals)
<input type="checkbox"/>		Out of Pocket	Daily Allowance

- Add Travel Allowance
- Edit Travel Allowance
- Edit Adjustments
- Delete Travel Allowance
- Reimbursable Allowances Summary

- For pre-trip reports, the Daily Allowance expenses must be removed by selecting the Travel Allowance dropdown and then clicking Delete Travel Allowance
- You cannot submit for per diem reimbursement until the completion of the trip

Daily Allowance & Excess Lodging

- When a hotel expense is created, the Travel Allowance checkbox will be automatically checked.
- If the hotel expense is added to the report before Daily Allowance, there will be a hard stop alert that states “This expense cannot be submitted until Daily Allowance is added to the report. If you are not requesting Daily Allowance, please un-check the Travel Allowance checkbox on the Hotel Expense.”
 - Once Daily Allowance is added to the report, the hard-stop will clear
 - If Daily Allowance will not be added, the Travel Allowance checkbox is a bit hidden: it’s on the Hotel lines in the itemization. To get ahead of this, I have added the following Quick Tips to the Hotel Expense Type:

Expense Type *

Hotel X v

i Quick Tips
Travel Allowance Checkbox (located above the Comment box):

- If you're submitting a pre-trip expense such as a 1-night deposit, please un-check the Travel Allowance checkbox *prior to itemizing*
- If you're submitting a post-trip expense but will not be including meal per diems on this report (i.e. Daily Allowance), please un-check the Travel Allowance checkbox *prior to itemizing*
- For reports which include Lodging and Daily Allowance, the Travel Allowance box *must remain checked to calculate Excess Lodging*

Show Less

Daily Allowance

- Once a hotel expense has been added to an expense report, you can review the Reimbursable Allowances Summary
 - Statutory Limit is the federal lodging rate for your destination
 - Allowance Limit is the federal lodging rate multiplied by 150%
 - Above Limit shows the amount of Excess Lodging – if this amount exceeds \$0, an Excess Lodging reason must be selected on the Hotel expense

Travel Allowance

Reimbursable Allowances Summary

Filter Allowances

From To Rate Category

Location	Date	Rate Category	Expense Type	Expense Total	Statutory Limit ⓘ	Allowance Limit ⓘ	Above Limit	Reimbursable Amount
Washington, UNITED STATES	2024-10-16	Lodging	Hotel	\$500.00	\$275.00	\$412.50	\$87.50	\$500.00

Travel Profile & Booking

- How can I set up my travel profile?
 - Check your Concur profile: verify email, gender, date of birth, passport information, forms of payment, travel assistant, etc.
- Who can I contact for travel booking assistance?
 - Speak to a live agent call WorldTravel at (877) 602-4950 or email uncch_travel@worldtravelinc.com
- What are some things to look out for when booking travel?
 - Reimbursable expenses: luggage fees, Wi-Fi, seat upgrades (with an approved medical accommodation from the EOC)
 - Non-Reimbursable expenses: trip protection/insurance, seat upgrades
 - Personal days/booking outside of Concur: contact WorldTravel/Travel Team for flight cost comparisons

Your Information

Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Acting as a Travel Assistant

- What can I do as a Travel Assistant?
 - Book travel and modify current itineraries on behalf of the traveler
 - Contact WorldTravel and make changes to itinerary
 - Edit the travelers' profile settings
 - Even if you're not booking travel, being assigned as a Travel Assistant will grant you access to flight/hotel invoices for easier expense report reconciliation
- How am I added as a Travel Assistant?
 - In Profile settings, under 'Assistants and Travel Arrangers' by the end user

Assistants and Travel Arrangers **Go to top**

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

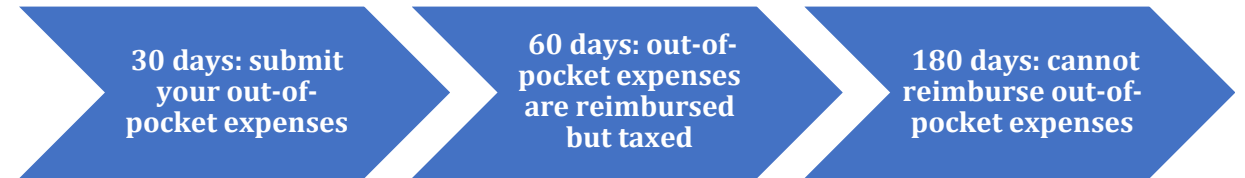
Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers **+ Add an Assistant**

Acting as an Expense Delegate

- Expense Delegates - CAN
 - Prepare travel request and expense reports (add receipts, allocation, itemization)
 - Can ONLY submit travel requests – if permission is granted by traveler
 - Reach out to Concur Support for alerts & warnings on report
 - Notify traveler report is ready for review & submission
 - Get status updates on submitted expense reports
 - Can work with Travel Team on returned reports for correction
- Expense Delegates – CANNOT
 - Submit expense reports for approval
 - Complete electronic Missing Receipt Declaration

Expense Reports



- What is an Expense Report?
 - Pre-trip report: airfare, hotel deposit, conference/seminar registration fees, prepaid parking on University Travel Card or Airfare Direct Bill Card
 - Post-trip report: ground transportation, daily allowance, itemized hotel expense, personal car mileage, etc.
- Why are there two expenses for the same transaction?
 - E-Receipts are automatically generated the day of booking or of exchange. It can take approximately 3-5 business days to merge with credit card transaction (displayed as *PLEASE SELECT PAYMENT TYPE for Airfare Direct Bill or Pending Card Transaction for University Travel card*) unless it is no cost exchange
- When should I submit my expenses?
 - University T&E card/Airfare Direct Bill transactions: 30 days from date of transaction or 30 days from last day of travel – whichever comes first
 - Out-of-Pocket transactions (post-trip): 30 days after the last day of travel

Payment Type *

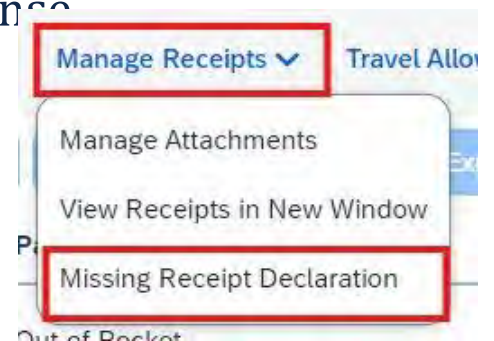
*PLEASE SELECT PAYMENT TYPE



Expense Reports cont.

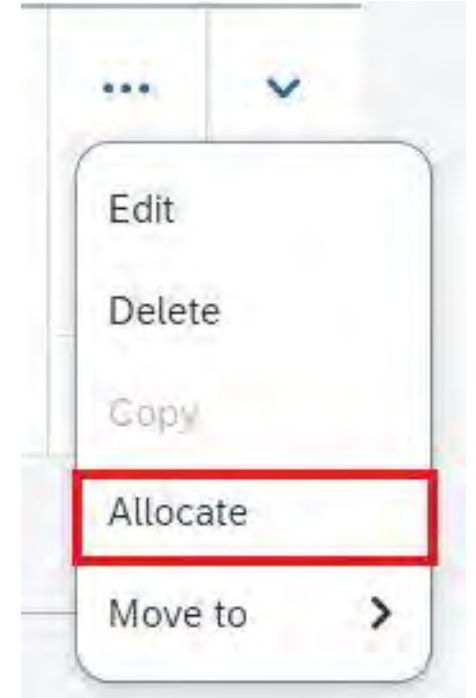
- Purchasing a flight outside of Concur – Review [1501.3 Procedures for Air Travel](#)
 - Must justify purchasing flight by providing flight cost comparison to show a \$25 domestic/\$100 international savings
 - Must use your personal credit/debit card, cannot be reimbursed until trip completion
- Do I need a receipt for all transactions?
 - Yes: airfare, hotel/lodging, car rental & conference/event registration fees, **conference agendas are encouraged to be attached to expense report if available**
 - No: daily allowance (per diem), mileage, Non-Reimbursable/Personal Expense
- Missing Receipt Declaration
 - Must be completed electronically within Concur by traveler
 - Cannot be used for airfare, hotel, car rental, or conference/seminar fees
 - Delegate/Admin Assistant does not have access to create in report

Receipt↑	Payment Type↓	Expense Type↑
	Airfare Direct Bill	Airfare Reservation
	*PLEASE SELECT PAYMENT TYPE	Airfare
	University Travel Card	International Transaction Fee (T&E Card Only)



Expense Reports - Non-overnight Travel

- Should I submit an expense report containing day travel?
 - Yes, this can include: business meals, daily personal car mileage, attending a conference/seminar w/no overnight travel
- Best practices:
 - Consolidate all non-overnight travel expenses into ONE monthly report and submit
 - Enter a Chart Field String (CFS) on the report header, and individual expenses can be allocated as necessary
- Non-overnight travel does not require a travel request (unless requested by your dept.)



Expense Reports - Expense Types

- Airfare – flight invoice
 - Baggage, Wi-Fi
- Hotel/Lodging - itemized receipt
 - Booking through conference at negotiated rate/room blocks
 - Itemizations: applying deposits, marking expenses as 'Non-Reimbursable/Personal Expense
- Daily Allowance (per diem)
 - Creating a travel itinerary
 - Indicating which meals were provided, and NOT paid out-of-pocket
 - Checking adjustments
- Personal Car Mileage
 - No travel request required (unless requested by dept.)
 - Making round trip – one line item for each trip, can't split up
 - Exception: Data Collectors option is special as they receive full reimbursement rate

Q&A

**Next Business Office Monthly Webinar
Thursday, 2/20/25 8:30am – 10:00am
Register in Carolina Talent (search for Concur)**

Concur Support

Upcoming Virtual Open Office Hours

Drop-In Virtual Office Hours
Tuesday & Thursday
2-3pm EST

Join Concur support's weekly virtual office hours via [Zoom](#).
Registration is not required.
Questions regarding business travel and expense are encouraged!

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 email

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

Phone: (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/>

- P-Card Card questions can be emailed to pcard@unc.edu

- University Travel Card questions can be emailed to travelcard@unc.edu

- 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