# CONCUR TRAVEL AND EXPENSE MANAGEMENT
## TRAVEL EXPENSE REIMBURSEMENT

## What is CONCUR?
A robust solution supporting travel and procurement card activities at the University of Kentucky.

## What are the benefits?
- Provides a better overall user-experience.
- All requests are handled online through the workflow, eliminating the need for signatures. Provides flexible workflow solutions.
- Reimbursements are made through direct deposit and will result in quicker reimbursements to the traveler.
- Helps to standardize business procedures pertaining to travel

## Where can I learn more about CONCUR?
**CONCUR Quick Reference Guides**: https://www.uky.edu/ufs/concur-quick-reference-guides
**CAFE Business Center**: https://cafebusinesscenter.ca.uky.edu/content/travel-faqs-and-quick-reference-guides
**myUK Learning On-Demand Videos**: To access these videos, login to myUK and go to the Employee Self Service tab. Select myUK Learning, then select learning and search for the "Concur" videos. The On-Demand videos include demos such as creating a general travel request, travel expense report, procard expense report, and the approver process.

## Where do I complete a CONCUR travel reimbursement?
Go to **myUK portal**, click on the **Employee Self Service** tab; go to **CONCUR travel and expense management.**

## What am I required to attach to my travel expense report?
Supporting documentation will be required for all travel and can be reviewed throughout the submission process**.** All documentation is stored electronically based on the University's document retention process. All receipts/documentation should be electronically uploaded into CONCUR. Attachments can be added to a request in Concur and will be available for individuals in the workflow to review the documentation associated with the travel request. Up to 10 files can be attached to the request; each attachment has a file size maximum of 5MB. Once the expense report is posted in SAP, the attachments and receipts will be available for users to access in SAP.

## How do I combine my receipts/documentation into one document for my attachment?
1. Within Adobe Acrobat, click on the **Tools** menu and select **Combine Files**.
2. Click **Combine Files**, and then click **Add Files** to select the files you want to include in your PDF.
3. Click, drag, and drop to reorder the **files** and pages.
4. When finished arranging **files**, click **Combine Files**.
   Attach files using the following procedure:
   https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/attachments.pdf

## Why haven't I received my reimbursement yet?
On the Concur webpage, click on the **Expense** tab to see your report library of active reports. Verify that the report status is showing as "submitted." To review the approver workflow on submitted reports, select the

Additional resources: begin with your department business staff and visit http://www.uky.edu/ufs/travel-services for more resources.

desired expense report and select **Report Retails**. In that screen, select **Report Timeline**. The Report Timeline will show previous approvals and pending approvals.  Review the status, then contact your department business staff person if additional assistance is needed.

## When should I submit my CONCUR travel reimbursement report?

Travel expenses not paid with the university procurement card should be submitted by the end of the month following the month the travel concluded.  Absent exceptional circumstances, travel expense reports approved by travelers more than 60 days from the last date of travel will be reported as taxable wages.  Reimbursements will be included on the employee's paycheck for the payroll period processed after the final approval is received on the travel expense report. If the report is submitted more than 60 days from the last date of travel, the Over 60 Day Taxation Form needs to be attached to report.

## How do I assign a Delegate?

A delegate is an individual who has been assigned the responsibility of creating travel requests and travel expense reports on behalf of a traveler or a group of travelers. To assign a delegate, you must manually add him/her on your user profile

1. Go to your **Concur page**, select the arrow next to Profile, and then click on Profile Settings.
2. Scroll down to the Expense Settings section in the left column
3. Click on **Expense Delegates**
4. Select **Add** to add a new delegate.
5. Click the check boxes to assign the necessary permissions for this delegate. Save.

## Can I view where my Travel Expense Report was approved?

1. Yes, go to the Concur webpage.
2. Select **Expenses,** and then **Manage Expenses.**
3. Select the submitted report to view the additional details.
4. Select **Report Details and then Report Timeline.**
5. You can review the various levels of approval.