

SHS Travel/Continuing Education Procedures–Concur

Introduction

Student Health Services uses **Concur** to process continuing education and travel requests, arrangements, and expense reports. The Business Office coordinates Concur activities and assists staff with making travel arrangements and preparing requests and expense reports.

Expense types processed in Concur include:

- License Renewals
- Registration fees
- Online Training fees
- Hotel, airfare, meals, and other travel related expenses
- Mileage reimbursements

*****Note: If you are using Concur for the first time, you will need to set up your profile and assign your delegates. Please contact the Business Office at 458-8260 to set up your profile and assign your delegates. (See instructions for Concur- Delegates)***

Continuing Education

- Continuing Education must be related to position duties. Please consult your supervisor before submitting a request. A Concur request should be submitted and approved **prior to** making purchases/attending events.
 - Supervisor approval based on appropriateness of training content and time/date of training. Business Office approval based on remaining CE budget.

Concur Process

1. Submit Request. This will route to your supervisor for approval (permission to travel and/or to use CE funds). A Concur request should be submitted and approved **prior to** making purchases/attending events.
2. Make travel arrangements if travelling. Concur has built- in flight, hotel, and rental car booking tools available. The Business Office is happy to assist you in any way possible.
3. Attend travel event or complete license renewal/online CME course. Use your TAMU travel card for payment once Concur request is in Approved status. Keep email confirmations and receipts of all purchases to coordinate with each expense! Follow GSA guidelines for per diem rates and incidentals. (Business Office can help you find this information)
4. Create and submit Expense Report. The expense report is the document that initiates reimbursement.



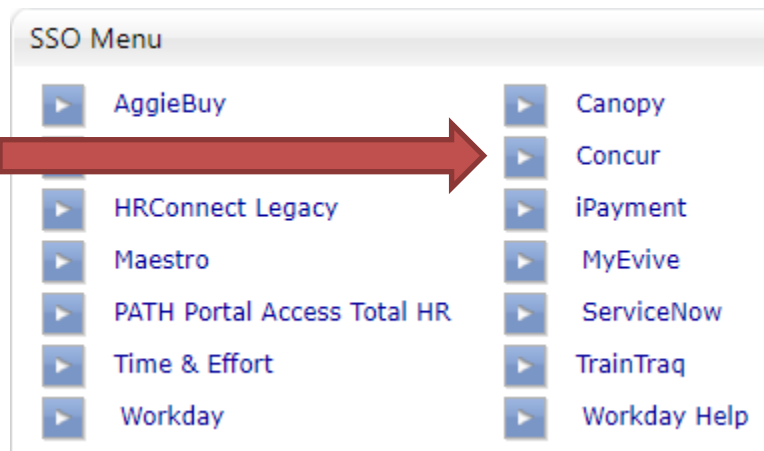
1. **Request**– It is best practice to receive verbal or email approval from your supervisor prior to submitting a request in Concur.

A request is needed for:

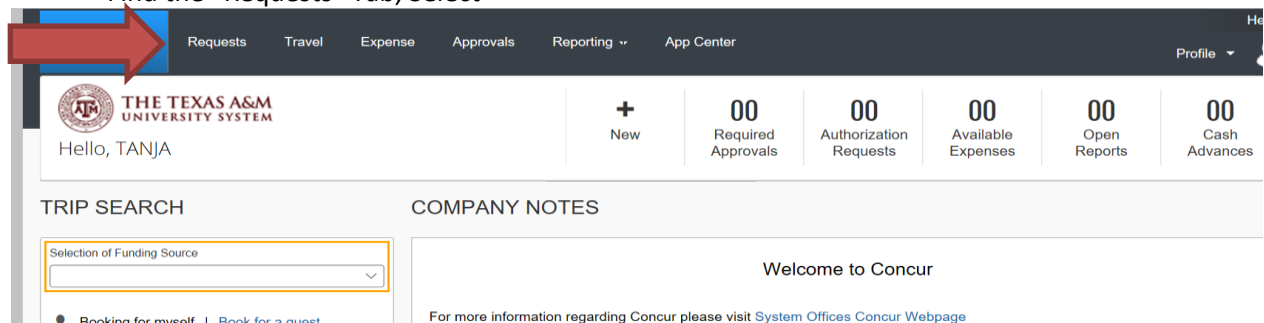
- Continuing Education travel events (off campus)
- Business travel events (off campus)
- Payment or reimbursement for fees as part of your continuing education budget (license renewal, online subscriptions)

How to turn in a request

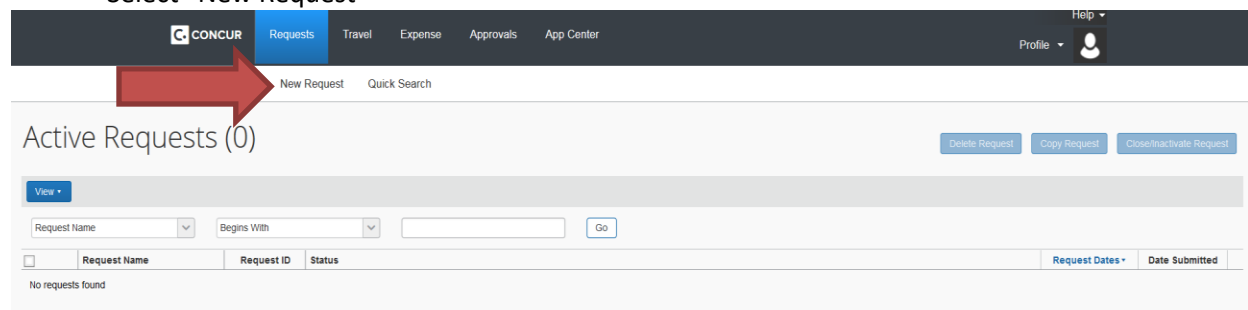
Log on to sso.tamus.edu → SSO MENU → Concur



Find the "Requests" Tab, Select



Select "New Request"



This will lead you to the request header. All fields **highlighted in red** need to be filled.

- **Trip Name/ Destination:** Name of your conference and the location (If for CME, list as Continuing Education or Nursing License Renewal, etc.)
- **Trip Start Date:** First day of your trip
 - If you are doing an online Continuing Education course, you can use today's date.
- **Trip End Date:** Last day of your trip
- **Travel Classification:** Employee- In State OR Employee-Out of State
- **Traveler Type:** Staff
- **Trip Purpose & Benefit:** Explain in detail the purpose of the trip/license renewal or continuing education. Do not use abbreviations for associations or credentials if possible. We will also need to note whether travel is required or not, and notate how the license and/or trip is beneficial to your position.

Example-

Manage Requests New Request Quick Search

Request

Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Trip Name/Destination:
Trip Purpose & Benefit:

Request Header Expenses Approval Flow Audit Trail

Trip Name/Destination? ^{h?} Continuing Education, Austin, TX	Trip Start Date 12/01/2017	Trip End Date 01/02/2018	Travel Classification Employee-In State	Traveler Type Staff
Student Travel Activity Type	Contracts/Grants No	Trip Purpose & Benefit Family Medicine Conference, earn continuing education credits	Personal Travel Included? ^{h?} No	Non-Employee/Student Traveler (Last Name, First Name) ^{h?}
Notes				
Foreign Risk? ^{h?}	Foreign Country 1	Foreign Country 2	Foreign Country 3	Foreign Country 4
System FAMIS	System Member (02) TEXAS A&M UNIVERSITY	Department/SubDepartment (BEUT) BEUTEL HEALTH CENTER	Account	Account Attribute

Be sure to save your Request Header.

Next, click on the **Expenses** tab.

Add each of your estimated expenses by clicking on the categories and saving.

- License Renewals and Continuing Education can be put under the **“Dues”** category.

You will have to submit at least a \$1.00 amount, even if there is no cost associated with the travel event. This will ensure the correct routing process of your request.

Submit Request by clicking the orange **“Submit Request”** button.

Accept & Submit after you read the FAMIS Request Submit Confirmation.

After submission, the request will route for administrative and university approval. The Business Office staff will verify that you have sufficient CE budget funds available.

When the request is approved, the status will change to “Approved” and you can begin to make your arrangements/purchases. You will also receive an auto-generated email when the request is approved.

The screenshot shows the Concur interface for 'Active Requests'. At the top, there are navigation tabs for 'Requests', 'Travel', and 'Expense'. Below this, there are buttons for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (1)'. Below the heading, there are search filters for 'Request Name' and 'Begins With', and a 'Go' button. A table lists the active requests:

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining...	Action
Up to Date Subscription Continuing Education	GCMC	Approved	11/28/2017	11/28/2017	\$915.00	\$915.00	\$915.00	Expense

Please note: The Request is only the first step. You will not get reimbursed by only turning in the request. It is the authorization to travel or to use your continuing education funds.

2. Arrangements

Conference Registration:

- Use TAMU travel card or personal credit card to register for conference. Keep receipt!
- If using TAMU travel card, make sure you have sufficient CE funds available. If CE funds are not available, you will need to reimburse the University.

Airfare:

- Use Concur booking tool or book with airline directly. Do not use third- party vendors such as Expedia.
- If booking through Concur, travel itinerary will be saved in Concur and backed up by a travel agency.
- General guideline for flying out of CLL: Compare to AUS or IAH and if less than \$150 more, it is ok to fly out of CLL. Mileage and airport fees add up quickly.

Rental Car:

- Book in Concur to ensure best rate and insurance policy.
- TAMU has contracts with Hertz and Enterprise

Hotel:

- Make reservation through hotel if there is a conference hotel (special rate)
- For all other hotels, use the Concur booking tool. It will give you the best state employee rate guaranteed
- **Make sure to submit the state hotel occupancy tax form at the time of check out and double-check that hotel does not charge for state occupancy tax.

The Business Office will be happy to assist you in finding the best airfare, hotel rate, make reservations, etc. Please call ahead and make an appointment before you come down. It can get complicated and take up to 30 minutes to complete.

3. Travel

- Keep all receipts or take pictures and upload them directly to Concur
- Receipts need to be itemized (show each line item of what you had to eat and drink)
- Before travelling, contact the Business Office to find out your GSA per diem rate for meals and incidentals. Please note that if you exceed your daily allowance, you will be responsible for paying the difference.
- Alcohol is not allowed to be put on your TAMU card – this must be a personal expense
- For in-state travel, the state occupancy tax is not reimbursable. A State Hotel Occupancy Tax form can be found on the SHS website under staff resources or from the Business Office staff. The employee travelling is responsible for providing this form to the hotel upon arrival or check out to have this tax waived.
- Taxes are reimbursable on meals.
- For out-of-state travel, all taxes are reimbursable.

4. Expense Report

After you return from your travel event or complete your CME courses, you need to submit an **expense report**. If you have used your TAMU travel card, it will usually take a few days for the charges to feed into the Concur profile.

How to create an expense report:

1. Select your request

The screenshot shows the Concur web interface. At the top, there are navigation tabs for 'CONCUR', 'Requests', 'Expense', and 'Approvals'. Below the navigation, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main content area is titled 'Active Requests (2)'. There are three buttons: 'Delete Request', 'Copy Request', and 'Close/Inactivate Request'. Below this, there is a search bar with 'Request Name' and 'Begins With' dropdowns, and a 'Go' button. The main table lists two requests:

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approv...	Remaini...	Action
<input type="checkbox"/>	Tulsa, Oklahoma Continuing Medical Education (Oklahoma State University 18th Annual Emergency Medicine Review) to enhance my knowledge of emergency care, thereby improving emergency care in the student health center.	79VF	Approved	06/04/2015 06/07/2015	05/06/2015	\$1,358.00	\$1,358.00	\$1,358.00	Expense
<input type="checkbox"/>	Fort Worth, Texas 2015 Primary Care Summit at UNT Health Science Center Update on chronic medical conditions. Current information on several topics applicable to the student health clinic. Improving	79DE	Approved	04/30/2015 05/03/2015	04/19/2015	\$705.00	\$705.00	\$443.95	Expense

A red arrow points to the first request, with the text 'Just click on the request' next to it.

2. Create expense report

The screenshot shows the 'Request 7DVF' form in the CONCUR system. The top navigation bar includes 'CONCUR', 'Requests', 'Expense', and 'Approvals'. The user is logged in as 'STYDUHAR, EDWARD A'. The request status is 'Approved' with an amount of '\$1,358.00'. A red arrow points to the 'Create Expense Report' button. The form contains the following information:

Request Header	Expense Summary	Approval Flow	Audit Trail
Trip Name/Destination: Tulsa, Oklahoma	Trip Start Date: 06/04/2015	Trip End Date: 06/07/2015	Travel Classification: Employee-Out of State
Contracts/Grants: No	Trip Purpose & Benefit: Continuing Medical Education (Oklahoma State University 18th Annual Emergency Medicine Review) to	Personal Travel Included?: No	Traveler Type: Staff
Foreign Risk?:	Foreign Country 1:	Foreign Country 2:	Foreign Country 3:
System: FAMIS	System Member: (02) TEXAS A&M UNIVERSITY	Department/SubDepartment: (BEUT) BEUTEL HEALTH CENTER	Account Attribute: Account

This will populate the report header with the information you provided in the request.

You will need to select your:

- Account number (302970-xx000) - the last five digits are your support account for the unit you work for, i.e. 21000 for Medical Clinic or 32000 for Pharmacy. There will be a drop down you can select from. Please ask the Business Office if you are unsure.
- Account Attributes: Local

The screenshot shows the 'Report header for: Tulsa, Oklahoma' form. The form contains the following information:

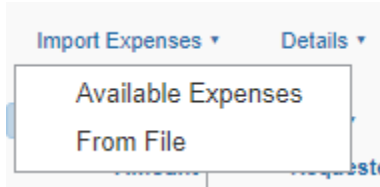
Destination: Tulsa, Oklahoma	Trip Start Date: 06/04/2015	Trip End Date: 06/07/2015	Report Date: 05/15/2015
Policy: FAMIS	Purpose & Benefit: Continuing Medical Education (Oklahoma State University 18th Annual Emergency Medicine Review)	Report Key: 210807	Report Id: 3147501F4F6D454BB6F3
Report Currency: US, Dollar	Approval Status: Not Submitted	Payment Status: Not Paid	System Member: (02) TEXAS A&M UNIVERSIT
Department / Sub-Department: (BEUT) BEUTEL HEALTH CE	Account: (302970 21000) MEDICAL C	Account Attributes: (L) LOCAL	Personal Travel Included?: No
Department Reference Number:	Travel Classification: Employee-Out of State	Student Travel Type:	Notes:
Auth. Request Encumbrance Release: Final	Famis External VID:		
GSA RATES: 0.00			

At the bottom, there is a 'Requests' table with 'Add' and 'Remove' buttons, and 'Save' and 'Cancel' buttons.

- Save

This will take you to the Expense tab.

*If it has been a few days since you made the purchases on your TAMU card, there is a good possibility the charges will show as “available” in Concur. To find this, click on Import Expenses – Available Expenses From File. This will allow you to select and move the available expenses to the current report you have created.



If you are needing to add expenses to the report not made on your TAMU card (for example: if you paid out of pocket with your personal card and are requesting reimbursement), click

- New Expense, select a category, i.e. “Conference Registration”. Fill in the required fields.

 A screenshot of the Concur Expense Entry form. The form is titled 'Expense' and includes a 'Receipt Image' button. The form fields are organized into several sections:

- Expense Type:** Conference Registration (dropdown)
- Transaction Date:** 05/12/2015
- Business Purpose:** (empty text field)
- Vendor Name:** OSU HEALTH SCIENCES
- City:** (empty text field)
- Payment Type:** Corporate Card Agency Liabili (dropdown)
- Amount:** 440.00 (text field) with a USD dropdown
- Personal Expense (do not reimburse):** (checkbox, unchecked)
- Comment:** (empty text area)
- Travel Classification:** Employee-Out of State (dropdown)
- Clearing Account:** 02-011170-00000
- FAMIS REF-A:** 2010
- FAMIS REF-B:** (empty text field)
- *TAM-Custom 06-Citi Corp Id:** 70190
- Request:** 06/04/2015, \$440.00 - Tulsa (dropdown)

 Below the form fields is an 'Attendees' section with a summary: 'Attendees: 0 | Attendee Total: \$0.00 | Remaining: \$440.00'. There are buttons for 'New Attendee', 'Advanced Search', 'Favorites', and 'Search Recently Used'. At the bottom of the form are buttons for 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'.

You will need to attach a receipt or some proof of payment. To attach a receipt, scan the receipt to your PC, save the file to your desktop, browse, and attach. We encourage staff to use the Concur Mobile App to track expenses, upload pictures of receipts, etc.

You will be able to add more receipts, calculate your mileage reimbursement, etc., all within the system. Please let the Business Office staff know if you need any assistance before submitting.

- Once completed, click “Submit Report” (top right corner)

Your report will then route for approval. After the department’s approval, the report will route to FMO for review. The FMO travel auditor will contact you directly if any information is missing/ not clear. Please make sure to check your emails frequently. Feel free to contact the Business Office with any questions.