Concur Resources

[Concur](#) is the software program the university uses for pre-travel approval, travel booking (airfare, hotel, rental car, train), and travel and business entertainment expense reimbursements. Faculty and staff (postdocs are considered staff) utilize Concur; students and guest travelers will continue to use [Web Travel](#) (CABS) until further notice.

Prior to submitting the travel request/expense report, identify the funding source/CFS (chartfield string) – work with the traveler/business office.

It's important to clearly articulate the business purpose of the travel/expense when submitting requests. Best practice: attach agenda, describe purpose of trip (ex: Dr. X is presenting at xx conference, Candidate x for dept x dinner with dept heads following interview).
- If you use the conference abbreviation as the title of the report, make sure you utilize the comments field to give the full name of the conference and the business purpose.

Start with the approved **Travel Request** to create the expense report (this pulls the funding information from the original request and shows the approvers the travel expenses were pre-approved).
- **Reconciling Transactions:** we submit two expense reports if we are booking travel in advance via university tools (**direct bill, T&E card, P-card**). Best practice: reconcile within **30 days** of the transaction date.
  - Expense report #1 = pre-trip expenses (registration fees, airline ticket)
  - Expense report #2 = post-trip expenses (per diem, lodging, ground transportation).
- **Seeking Reimbursement**: if the traveler used personal funds to pay for travel, the reimbursement request should be submitted withing 30 days of completing the trip.
  - See the [Accountable Plan Notice](#) (effective 1/1/2024)

When in doubt, reach out to the ==[Concur support desk](#)== – they are super responsive and helpful.

Websites to bookmark
- [Concur Resources](#)
- [Travel and Expense Resources](#)
- [Travel Allowances, Mileage and Per Diem Rates](#)
- [SPH International Travel Toolkit](#) (prior approval required)
- [Global Affairs: Preparing for International Travel](#)

Pre-Travel resources
- [Traveler Responsibilities](#)
- [Travel Guide](#)
- [Travel Checklist](#)
- [Business Travel FAQ](#)
- [When to use a T&E Card vs. a P-Card](#) (summary of allowable charges)
- [Paying for Travel Expenses by Traveler Type](#) (chart to determine form of payment)

Guides/QRCs
- [Concur checklist](#) (succeeding with Concur)

- [Setting up your profile](#)
- [Submitting a Travel Request - see pg. 22](#) (all overnight travel requires approval)
- [Making a trip booking in Concur](#)
- [Using the Concur mobile app](#) (you can snap a pic of the receipt and upload to your profile)
- [Creating an expense report from the approved travel request](#) (pg. 49 in the Quick Start Mini Guide)
- [Linking an approved travel request to an expense report](#)
- [Creating a new expense report](#) (expenses that are not travel related, ex: business meal)
- [Adding receipts to an expense](#)
- [Utilizing the Travel Allowance Wizard](#) (per-diem and incidentals)
- [Viewing the Audit Trail – see pg. 52](#) (view the status of your request)
- [Closing/Inactivating a Travel request](#) (once all expense reports have been approved)

Forms

- [SPH International Travel Approval Form](#) (attach to Travel Request in Concur)

- [Missing Receipt Affidavit Form](#) (cannot be used for lodging, airfare, conference registration or car rental – contact the vendor for a copy of the receipt)
  - Not needed for transactions that are $20 or less

- [Group Travel Request Form](#) (if paying for group lodging for multiple travelers)

- [Excess Lodging Justification Form](#) (University follows [per-diem rates](#))

- [Non-Hotel Lodging Authorization Request Form](#) (3rd Party Lodging, e.g.: Airbnb, VRBO)

Policies and Procedures

- [Business Travel Policy](#) (1501)
  - [Procedure on Pre-Travel Authorization](#) (1501.1)
  - [Procedure on Travel Advances](#) (1501.2)
  - [Procedure on Air Travel](#) (1501.3)
  - [Procedure on Ground Transportation Expenses Including Mileage Rates](#) (1501.4)
  - [Procedure on Per Diem Rates](#) (1501.5)
  - [Procedure on Lodging Accommodations](#) (1501.6)
  - [Procedure on Travel Expenses and Reimbursement](#) (1501.7)

- [International Travel](#) (requires pre-approval)

- [Policy on Export Controls](#) (exportcontrol@unc.edu)

- [University-Related Business Entertainment Expenses Policy](#) (1263)

- [Expense Reimbursements](#)

  - [Accountable Plan Notice](#) (effective Jan. 1, 2024)