

Concur Profile Information

1. Do I have to create a profile? How do I do this?

Profiles for all employees will be automatically created in Concur using the information from Human Resources. You will verify your profile information, update optional information, and add any travel assistants/arrangers/delegates.

For assistance, click the link to the video tutorial below -

[Setting up a User Profile](#)

2. Can I assign a delegate to make my travel arrangements and prepare my travel expense reports?

Yes, you may assign a Primary Travel assistant/arranger to book trips on your behalf – you may have more than one travel assistant/arranger, but only one will be your Primary and book your travel.

Individuals with no work phone number in their profile cannot be designated as primary assistant for travel.

You can also assign expense delegates to create travel expense reports for you. A delegate cannot submit a travel expense report for you, but a delegate can prepare the report. The traveler must submit their own expense report. By submitting the travel expense report, you are electronically signing the document and including the certification that is required for reimbursement.

3. Do I have to assign the delegate or can someone else just do it for me?

You must be the one to assign your own delegates. This is to ensure that you are aware of who has access to your profile information. If you are unable to do this, Travel Services may assign delegates with written approval. Email travel@tamuk.edu.

4. Can I have multiple travel assistants/arrangers, delegates, credit cards and/or rewards programs?

Yes, you can have multiple travel assistants/arrangers (only one is the primary and can book travel), delegates, credit cards (University/Personal) and/or rewards programs.

5. Are there e-mail notifications available in Concur?

Yes, e-mail notifications are available for changes in status of documents, items needing approval, trip reminders, tickets held reminders and several other options. Use your TAMUK email address and verify it in your profile. If you have given permission for a delegate to receive e-mails, then the delegate should also have a verified work e-mail.

Check your Microsoft Outlook Clutter folder regularly, in case these notifications are being placed there.

Travel Request

6. Will we have to submit a Travel Request prior to booking specific airfare, hotel, etc.?

Prior approval via a Concur Travel Request is required before booking any travel accommodations. The employee will be responsible for repayment to the University, any travel purchased on the Travel Card that was not approved.

A video tutorial is available at the link below.

[How to Create a Domestic Travel Request in Concur](#)

[How to Create a Foreign Travel Request in Concur](#)

International Travel Requests must be approved at least 30 days prior to departure.

See the TAMUK [International Travel](#) webpages for more information.

7. Do I have to complete a Travel Request for every trip?

Yes, an approved Travel Request is required for every trip. However, blanket Travel Requests may be used if domestic travel destinations are the same throughout the semester/year. Blanket Travel Requests are not allowed for international travel.

8. When creating a Travel Request, do I have to encumber funds?

It is highly recommended that your travel expenses be estimated on the Travel Request. Zero estimated expenses will not route to your supervisor for approval. If you are traveling as part of a group and will not have any expenses, you must still have an approved Travel Request before departure. Document the circumstances of the trip using the IRS 5 W's. If you are using another department's account, add your supervisor (User-Added Approver) for approval to be off-campus.

Click the link below for a video tutorial on User-Added Approvers –

[How to Add an Approver to Request Routing in Concur](#)

9. Is a Travel Request required if I am not requesting any University funds, but still representing the University?

Yes, an approved Travel Request is required for every trip. In this case, you would not encumber any funds, but you will want to add your supervisor as an approver, so that you will have the approval to be off-campus.

10. What if the actual expenses in the Expense Report exceeds the original encumbrance created by the Travel Request?

The amount of an Expense Report can be less than or exceed the amount of the Travel Request – the

travel expenses are only estimated in the Travel Request.

11. How is the encumbrance liquidated?

The liquidation of encumbrances is based on the expense categories/object codes selected on the Travel Request and the Expense Report. If there is an amount in an object code on the Travel Request, it will encumber the funds in FAMIS. If there is an amount on the Expense Report that is in the same category/object code as the Travel Request, then the encumbrance will be adjusted. If the Expense Report indicates this is a final liquidation, then the encumbrance will release completely in FAMIS. If it is indicated as a partial, then there will be a partial liquidation. There is a possibility that an encumbrance does not liquidate completely in Concur and/or FAMIS. Employees and departments should be checking their accounts on a regular basis for those encumbrances that have not liquidated.

12. What is the routing path for Travel Requests? Can we change this?

Routing paths for Travel Requests are the same as for Expense Reports, and are based on the department's CODE (example: ATHL, CLAS, HKPE, etc). If you have questions regarding the approval path for your department's travel expenses, check FAMIS screen 919. If changes are required, send a detailed email to travel@tamuk.edu.

Concur fees

13. What charges are associated with using Concur?

Concur will charge a rate of \$7.08 for each Expense Report processed by the traveler. This charge will be posted to the account that the Expense Report is charged to in FAMIS. The charge will post to FAMIS after all approvals are received, auditing has been completed and when the Expense Report has been posted to FAMIS.

14. What object code will the Concur fee be charged to?

5237 – Concur Fees

15. Can I combine trips and submit only one reimbursement request per month or year rather than for individual trips to avoid paying \$7.08 for each expense report?

Your Expense Reports should make sense to an auditor and include information that covers the 5 W's for the IRS. Combining too many trips into one Expense Report raises flags with approvers and auditors. If you are currently submitting expense reports monthly for mileage, you can continue this process. Conference trips should each be submitted on their own expense report.

16. Are mobile apps available for use with Concur?

Yes, there are several mobile apps available and you are encouraged to use them. Go to the App Center in Concur to view the apps that are available and to connect. Concur Mobile has most of the features that the desktop version has, so it allows you to be productive on the go.

The ExpenseIt App works with Concur and makes it easier to manage and complete your Expense

Reports. Simply snap a photo of a receipt with your smartphone, and ExpenseIt auto-magically creates and categorize an expense entry and even itemizes hotel bills. Keep in mind that individual meal receipts are no longer required in Expense Reports – do not upload to Concur.

TripIt, from Concur, is the world’s highest-rated travel organizing app, so you stay one step ahead while traveling. Simply forward your flight, hotel, or other travel confirmation emails to plans@tripit.com and TripIt will instantly create a master itinerary for each of your trips that you can access anytime, anywhere. TripIt provides real-time flight alerts and other info to keep you organized on the go.

Click on the links below for Concur Mobile and ExpenseIt video tutorials –

[Using Concur Mobile to Make Travel Reservations](#)

[Using Concur Mobile to Create an Expense Entry](#)

[Using Concur Mobile to Add an Expense Entry to a Report](#)

[Using Concur Mobile to Approve Requests or Reports](#)

[Using ExpenseIt to Create and Add an Expense and Receipt to an Expense Report](#)

Expense Reports

17. How do I create my Expense Report?

Expense Reports are created from the approved Travel Request in Concur. Please see the link below for the video tutorial –

[How to Create an Expense Report from an Approved Request](#)

18. How do I add expenses and receipts to my Expense Report?

University Travel Card transactions are located in Available Expenses. Select those transactions for this trip, click Move and select the expense report name.

For a refresher on how to add expenses and receipts to an Expense Report, please view this video tutorial –

[How to Add Expenses to an Expense Report](#)

19. I do not see a place to attach the conference agenda to the Expense Report – where can this be uploaded? Do receipts have to be uploaded to each line item/expense?

The conference agenda or schedule of events, as well as expense receipts, for your trip can be uploaded to the Report Header. Keep in mind that individual meal receipts are not required per TAMUK Travel Policy effective Sept 1, 2016, and are not to be attached to your Expense Report in Concur.

For a refresher on how to add expenses and receipts to an Expense Report, please view this video tutorial –

[How to Add Expenses to an Expense Report](#)

20. How is my personal mileage claim determined? Is gasoline for my personal vehicle an allowable expense?

The current mileage rate is preloaded into Concur. Using the Google Map feature, enter your daily mileage information and Concur will calculate the correct mileage reimbursement for your trip.

No – gasoline purchased for your personal vehicle is not an allowable expense. When using your personal vehicle, you may claim mileage reimbursement, which covers all expenses associated with the employee’s use of his or her own vehicle. Per Texas Gov’t Code Subchapter C Section 660.041, an employee may not be reimbursed for an expense other than mileage, tolls, and parking, when using their personal vehicle.

21. What happens if I accidentally pay for something personal with my Travel Card? What if I go over on the allowable for meal expenses?

For any charges in error, overages on M&IE allowable, un-allowed expenses, etc., you will be required to reimburse the University as soon as possible. Follow the procedure as outlined below -

Travel Procedure - Reimbursement to University (Travel Card used in error, overages on M&IE Allowable Rate, un-allowable expenses, etc.)

- As soon as the error or overage is noticed, follow the steps listed below or contact Travel Services for information and assistance on the reimbursement.
- If traveler has out-of-pocket expenses (including personal car mileage) to claim and the amount of the out-of-pocket expenses is more than the error or overage charged on the University Travel Card, Concur will deduct the personal expenses from the out of pocket expenses that are claimed.

Does Traveler have Out-of-Pocket Expenses to claim on the Expense Report?

NO, there are no out-of-pocket expenses to claim on the Expense Report (personal car mileage, etc.). The employee must reimburse the University.

Complete the Travel Card Refund Form with the appropriate information. The form is available on the TAMUK Travel Forms webpage at TAMUK.edu.

Bring the completed Travel Card Refund Form to Travel Services, College Hall - Room 111, for approval. Once initialed by Travel Services, take to Business Office to pay.

Scan and attach the Travel Card Refund Form and the cashier's receipt to your Expense Report.

YES, there are out-of-pocket expenses on the Expense Report – Do not make payment to the Business Office!

In your Concur Expense Report, itemize the expense line item to show the portion that is a personal expense and reimbursed to the University. Check the “Personal Expense (do not reimburse)” box for that portion that was reimbursed to the University. Be sure to itemize the remaining amount as well.

If entire amount of the expense line item is personal and reimbursed to the University, do not itemize, but check the box “Personal Expense (do not reimburse)” for the entire line item.

Attach all other required support documentation for expenses and submit Expense Report for approval and payment.

Original receipts are required in Concur for all travel expenses, except individual meals. Your department may request submittal of individual meal receipts as a separate file.

For a refresher on how to mark an expense as personal in Concur, please click the link below for a video tutorial –

[How to Mark an Expense as Personal](#)

22. How do I itemize an expense line item?

Please review the following video tutorial for a refresher on itemizing expense line items.

[How to Itemize an Expense in Concur](#)

23. My College Dean has allowed a certain amount to be expensed on their account. How do I allocate the expenses to this account?

Please click on the link below for a video tutorial on allocations.

[How to an Allocate an Expense in Concur](#)

24. What if my department only allows for a partial payment/reimbursement of my expenses?

You may claim less than actual expenses on an Expense Report if you paid out of pocket.

If you used the University Travel Card and your expenses total more than your department allowed, you will mark the expense amounts that are over your department's approved amount as personal and reimburse the University for the overage as soon as possible. See above for the Procedure on Reimbursement to the University.

25. Will I be required to turn in receipts for all my transactions, including meals?

All travel expense receipts are required to be attached to your Concur Expense Report, *except for individual meal receipts*. Your department may require you to submit individual meal receipts in a separate file.

26. Can meals be lumped together for a day or a trip? Should I itemize each meal daily? Can I claim the total per diem each day of the trip?

Travel Expense payments/reimbursements are not a per diem. An employee must claim only the actual expense incurred for meals not to exceed the maximum allowable daily rates as listed in the GSA Per Diem (Daily) M&IE (Meals & Incidental Expenses) Rate. The maximum allowable daily rate should not be claimed unless the actual expenses equal or exceed the maximum allowable daily rate. The payment/reimbursement limit applies to each day – leftover amounts cannot be carried over to another day.

Individual Meal expenses are payable or reimbursable at actual expenses up to the GSA Per Diem (Daily) M&IE Rate for your destination – and an overnight stay is required. If your destination is not listed, the Standard Rate for the destination state applies.

Receipts for individual meal expenses are not required for meal expenses after Sept 1, 2016, except for any single meal expense greater than \$75.00 (taxable per IRS Rule). *Do not attach individual meal expense receipts for amounts less than \$75 to your Concur Expense Reports.*

The University Travel Card is available to you as a convenience for your University business travel expenses. Best Practice is to use your University Travel Card for all University business travel.

Procedure:

Employee enters the GSA Per Diem (Daily) M&IE Rate in the GSA RATE field in the Detail Report Header in the Concur Expense Report. The GSA Per Diem (Daily) M&IE Rate is found on the GSA website (www.gsa.gov) in the far right hand column of the rate page.

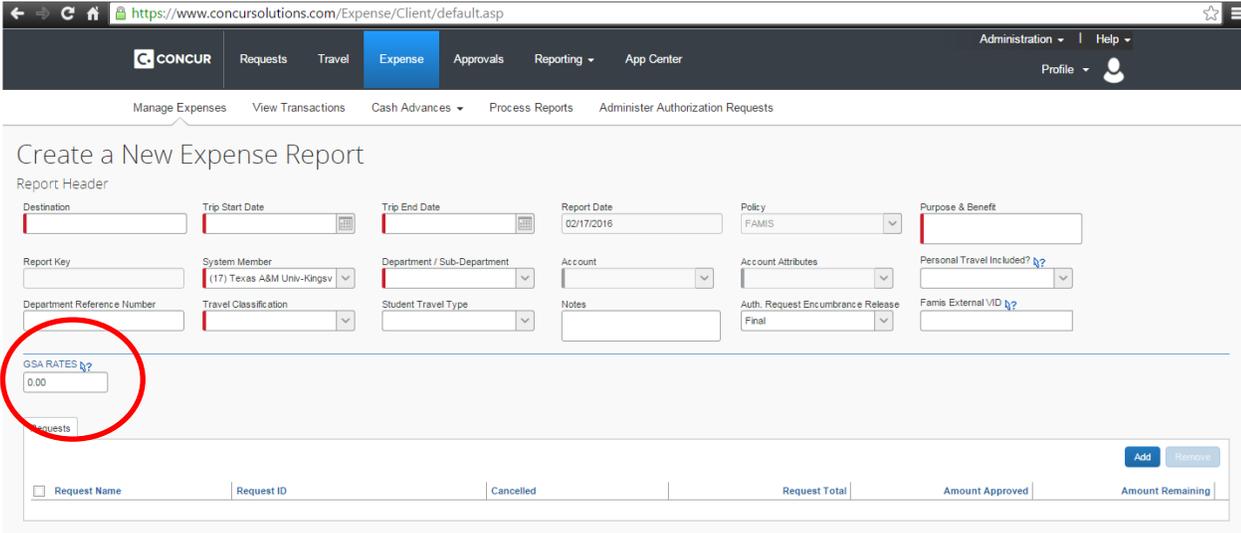
University Travel Card Meal Expenses – Employee moves meal expenses charged to the University Travel Card to the Concur Expense Report.

- If daily meal expense totals exceed the GSA Per Diem (Daily) M&IE Rate entered for your location, Concur will post an exception with details on the amount exceeded. If you do not have any out-of-pocket expenses, you will pay the overage amount to the University thru Travel Services/Business Office. If you have out-of-pocket expenses, your overage will be deducted from the claimed out of pocket expenses. Contact Travel Services for assistance.
- If a single meal totals more than \$75.00, you must attach the itemized receipt to your Expense Report. *Do not attach individual meal expense receipts for amounts less than \$75 to your Concur Expense Reports.*

Out of Pocket Meal Expenses – Employee enters the actual meal expenses into the Concur Expense Report as a daily total, with itemizations for each meal in the comment section, for transparency.

- Example – Actual Daily Meal Expenses total \$52.81. GSA Per Diem (Daily) M&IE Rate for your location is \$54.00 – you will be reimbursed your actual meal expenses of \$52.81 for that day.
- Example – Actual Daily Meal Expense total \$66.11. GSA Per Diem (Daily) M&IE Rate for your location is \$54.00 - Employee will enter the GSA Per Diem (Daily) M&IE Rate for the location (\$54.00). In the comment area, employee will enter the comment “I attest that my actual meal expenses for this day equaled or exceeded the GSA Per Diem (Daily) M&IE Rate for this location”. You will be reimbursed your actual meal expenses up to the GSA Per Diem (Daily) M&IE Rate of \$54.00 for that day.
- *Do not attach individual meal expense receipts for amounts less than \$75 to your Concur Expense Reports.*

GSA Rates:



https://www.concursolutions.com/Expense/Client/default.asp

CONCUR | Requests | Travel | **Expense** | Approvals | Reporting | App Center

Administration | Help | Profile

Manage Expenses | View Transactions | Cash Advances | Process Reports | Administer Authorization Requests

Create a New Expense Report

Report Header

Destination: [] | Trip Start Date: [] | Trip End Date: [] | Report Date: 02/17/2016 | Policy: FAMIS | Purpose & Benefit: []

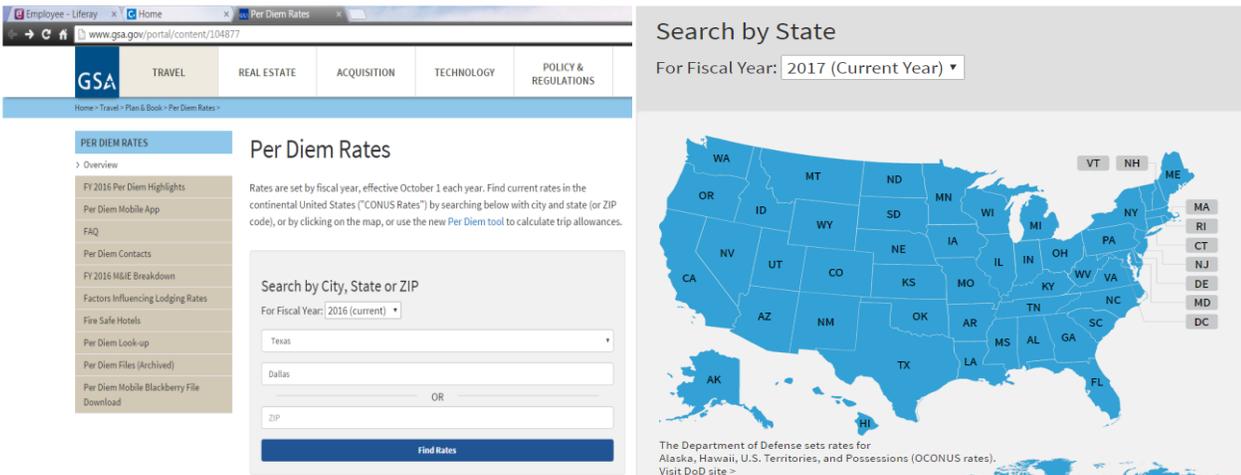
Report Key: [] | System Member: (17) Texas A&M Univ-Kingsv | Department / Sub-Department: [] | Account: [] | Account Attributes: [] | Personal Travel Included? []

Department Reference Number: [] | Travel Classification: [] | Student Travel Type: [] | Notes: [] | Auth: Request Encumbrance Release: Final | Famis External VID []

GSA RATES [0.00]

Request Name | Request ID | Cancelled | Request Total | Amount Approved | Amount Remaining

- Concur requires that the GSA Rates field in the Expense Report Header be populated with the correct GSA M&IE (Meals & Incidental Expenses) Rate for the destination city.
- To check the GSA M&IE Rates, click the blue GSA Rates to go to the GSA Per Diem Rate website. The link can also be found on the Travel section in JNET.



www.gsa.gov/portal/content/104877

GSA | TRAVEL | REAL ESTATE | ACQUISITION | TECHNOLOGY | POLICY & REGULATIONS

Home > Travel > Plan & Book > Per Diem Rates

PER DIEM RATES

Overview

- FY 2016 Per Diem Highlights
- Per Diem Mobile App
- FAQ
- Per Diem Contacts
- FY 2016 M&IE Breakdown
- Factors Influencing Lodging Rates
- Fire Safe Hotels
- Per Diem Look-up
- Per Diem Files (Archived)
- Per Diem Mobile Blackberry File Download

Per Diem Rates

Rates are set by fiscal year, effective October 1 each year. Find current rates in the continental United States ("CONUS Rates") by searching below with city and state (or ZIP code), or by clicking on the map, or use the new Per Diem tool to calculate trip allowances.

Search by City, State or ZIP

For Fiscal Year: 2016 (current)

Texas

Dallas

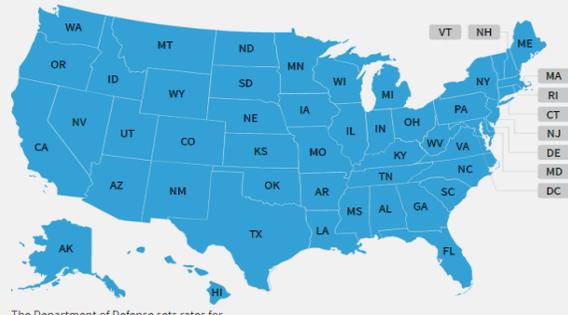
OR

ZIP

Find Rates

Search by State

For Fiscal Year: 2017 (Current Year)



The Department of Defense sets rates for Alaska, Hawaii, U.S. Territories, and Possessions (OCONUS rates). Visit DoD site >

- Enter the State/City or Zip Code of the location you are traveling to or scroll down and search by state.



Home > Travel > Plan & Book > Per Diem Rates > Per Diem Look-Up >

You searched for: Texas

Primary Destination (1, 2)	County (3, 4)	Max lodging by Month (excluding taxes)												M&IE (5)
		2016			2017									
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Se	
Standard Rate	Applies for all locations without specified rates	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$51
Arlington / Fort Worth / Grapevine	Tarrant County / City of Grapevine	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$152	\$59
Austin	Travis	\$141	\$141	\$141	\$158	\$158	\$158	\$141	\$141	\$141	\$141	\$141	\$141	\$59
Big Spring	Howard	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$124	\$54
College Station	Brazos	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$59
Corpus Christi	Nueces	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$106	\$59

- You will see the Max lodging by month and, on the right hand side, the M&IE (Meals & Incidental Expenses). The M&IE amount is what goes in the GSA Rate field in the Concur Expense Report Header.
- Be sure that you do not exceed the M&IE amount in your daily meal expenses. Any overages must be reimbursed to the University using the T-Card Refund Form as soon as possible after your return.

Credit Cards and Payment Methods

27. What credit cards can be used in Concur?

Concur works best with your University Travel Card. However, you may add a personal card if you wish.

28. If I use my University Travel Card, will all the transactions feed into Concur? Will all the receipts be included?

Yes, CitiBank will transmit all transactional data from the vendor to Concur. Vendors that provide e-receipts will submit them into Concur. Not all vendors provide e-receipts, so you may be required to add receipts into Concur if an e-receipt is not provided.

29. Do I have to use my University Travel Card? What if I pay cash for an expense?

The University Travel Card is available to you as a convenience for your University business travel expenses. Best Practice is to use your University Travel Card for all University business travel.

You may use a personal credit card or pay cash/check for an expense and still get reimbursed. You will just note the expense as an “out of pocket” expense and provide receipts when required.

30. When I log into Concur I will see all credit card transactions. When will these go away and not be seen?

Every transaction charged to the University Travel Card will appear as an available expense to be applied to an expense report. Once a transaction is imported to an expense report, it is removed

from the list of available transactions. All transactions must be accounted for.

Funding

31. Will the transactions for encumbrances and Expense Reports automatically post to FAMIS? Will the budget be checked?

Travel Requests and Expense Reports will transfer into FAMIS nightly upon approval and will automatically post to the accounts included.

The budget will not be checked at the time of posting. Review of available funds/budget will be the responsibility of the approvers in the routing path of these documents. However, Fiscal will monitor these transactions as needed.

32. Can I use multiple account numbers on my Expense Report? What about using different system parts?

Yes, you can allocate expenses to multiple account numbers on an Expense Report. You can also allocate travel expenses to multiple system parts if the system part is participating in Concur.

Please review the following video tutorial for a refresher on allocating expenses.

[How to Allocate an Expense in Concur](#)

33. Can an approver change the account number on either a Travel Request or Expense Report?

Yes, approvers may make changes to accounts or dollar amounts on these types of documents. However, it is recommend if a change needs to be made, then the Travel Request or Expense Report should be returned to the employee with notes indicating what should be changed. This is to ensure that the employee is aware of any changes to the documents.

34. In Concur Travel, I will now have to select the type of funding (Local, State or Federal) to be used for my travel expenses. How do I know what type of funds I am using?

Always select LOCAL for the funding type. This will ensure that all local University policies are followed.

Non-employee and student travel

35. Can non-employee and student travel be booked using Concur? What about the expense reports?

Only TAMUK employees have access to Concur. Non-employee trips will need to be booked by an employee that has rights to book for a guest traveler, most likely an admin. This employee will use their University Travel Card to book travel for a guest traveler or student. After a trip, this employee would also be responsible for preparing and submitting the Expense Report for these non-employees.

Please review the following video tutorial for a refresher on reimbursing a guest traveler –

[How to Reimburse a Guest in Concur](#)

Additional information

36. Who can we contact for more information regarding Concur?

You may email Travel Services at travel@tamuk.edu or contact any of the Travel Services Team at the following extensions.

Sandra Charles	Ext 3950
Betty Contreras	Ext 3951
Debbie Branstetter	Ext 2544