

# Concur Travel Expense Report Checklist

- Log into Concur ([www.concursolutions.com](http://www.concursolutions.com)) & go to Requests.
  - If you do not see your request listed, go to: View, View All.
  - Once you've found your request, click on the "Expense" link.
- Report Name Format: "Destination, Travel Dates" (like the Travel Request).
  - Example: Savannah, GA 8/9-11/19
  - Make sure to update the dates on the Report Header if trip dates changed from the Request.
- Purpose of Trip: the name of event you are attending.
- Add Travel Request to the Report Header.
- Add Per Diem:
  - Click "YES" after saving the Travel Request Header.
  - Another way to add per diem is to go to: Details, New Itinerary.
    - Change the itinerary to "OUT OF STATE/INTERNATIONAL 75%" if travel was not in-state.
- Import expenses that were booked in Concur (including Travel Agent fee).
  - If you booked hotel, make sure to change the amount that was paid, excluding any personal expenses, and add detailed hotel receipt showing the payment method.
  - If booked in-state, any county or occupancy taxes must be deducted, as we are exempt.
  - If a rental car was booked, the FINAL [receipt](#) must be attached. If booking is with Enterprise, taxes and fees need to be deducted. We are exempt from these.
- Add Mileage to Report, if requesting reimbursement
  - Tier 1: .56 per mile
  - Tier 2: .16 Per mile (if renting a car was cheaper, but driving personal car was preferred)
- Add Registration & Membership, if requesting reimbursement
  - If reimbursed before the trip through OwlPay, do NOT add to Expense Report.
  - If requesting membership, make sure to add the approved individual membership form & documentation.
- Add Parking, Ground Transportation, Baggage Fees, & Gas for Rental car, etc.
  - For ground transportation, a note indicating where you are traveling to/from is required.
- Add Conference/Workshop/Meeting Schedule or a link to it.
  - If your travel didn't have a formal itinerary, add a memo explaining the business purpose of the trip.
- Make sure allocations are correct & appropriate approvers are added.
- Add your assigned Bus Op Specialist to the approval flow AFTER default approver.
  - If a Report is returned for any reason, approvers must be re-added to the approval flow in the recommended order when submitting a second time.