

# CONCUR TRAVEL EXPENSE REPORT CHECKLIST

- Log into Concur (www.concursolutions.com) Go to Requests**
  - If you do not see your request listed, go to View, View All
  - Click on "Expense"
- Report Name Format: "Destination, Travel Dates" (like the request)**
  - Example: Savannah, GA 8/9-11/19
  - Make sure to change the dates, if your 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
    - Make sure to change the itinerary to "OUT OF STATE/INTERNATIONAL 75%", if needed
- 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 hotel receipt
  - If booked in state, make sure to deduct any county or occupancy taxes, as we are exempt
  - If you booked a rental car, make sure to add FINAL receipt and deduct taxes & fees if booked with Enterprise
- Add Mileage to report, if requesting reimbursement**
  - Tier 1: .575 per mile
  - Tier 2: .17 Per mile (if Renting a car would've been cheaper)
- Add Registration & Membership, if Requesting Reimbursement**
  - If registration has already been paid back to you by Owl Pay, do not add
  - If requesting membership, make sure to add an approved membership form
- 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**
- Make sure to Add Ashlee Clark to the approval flow, first**