

Unofficial Concur **Request** Document

CONCUR – PRE-APPROVAL GUIDE:

Through CONCUR, a request (pre-approval) is the first step toward booking your travel. Due diligence and policy compliance will be reviewed before the trip takes place. With that said, please use the below as a guide to help document your trip request. Once the trip is completed, you will need to go back into CONCUR to reconcile the expense along with revising any documentation.

This unofficial concur request document is a work in progress as we navigate the new system and way of doing business. Subsequent versions may be distributed.

Will you need reimbursement for hotel?

- The expense request must include:
 - Screen shots of estimated hotel rate (Obtained in Concur) OR screen shot of a conference rate that is usually available with the conference itinerary or announcement.

Will you need reimbursement for airline tickets?

- The expense request must include:
 - Direct Travel itinerary of estimated airfare (Obtained in Concur)
 - If personal travel is included, please attach an airfare estimate with personal travel dates, AND a second estimate without the personal travel dates

Provide a full explanation of the business purpose for charging expenses?

- All university travel related reimbursement should have a clear business purpose detailed. The business reason must demonstrate how the expense benefits the University and the employee in their position.
- Business purpose is defined as one that supports or advances the goals, objectives, and mission of the University. An expense report must be submitted that adequately describes the expense as a necessary, reasonable, and appropriate and must include and answer: “who, what, when, where AND why”.

Will you need reimbursement for a conference?

- The expense request must include:
 - The conference registration fee needs a receipted bill or registration confirmation, even if the registration was paid via P-card/T-card or PO. The alternate payment type may be noted in the comments
- The conference itinerary is a required attachment. Please be sure to include that.

Will you need reimbursement for meals for travel?

- The expense request must include:
 - An estimate of per diem (Obtained in Concur through Manage Travel Allowances)
 - The conference itinerary/agenda will show meals offered at the conference.
 - If the current agenda is not yet available you may attach an agenda from last year’s conference.

<p><i>Will you need reimbursement for <u>car rental</u>?</i></p> <ul style="list-style-type: none">• The expense request must include:<ul style="list-style-type: none">- Screen shots of estimated rental car rate (Obtained in Concur)
<p><i>Will you need reimbursement for commercial <u>bus/rail fares</u>?</i></p> <ul style="list-style-type: none">• The expense request must include:<ul style="list-style-type: none">- Screen shots of estimated bus/Amtrak rate (Obtained in Concur)• Tickets for local/commuter train service (NJ Transit, NYC Subway, etc.) include a screen shot of NJ Transit or NYC Subway website
<p><i>Will you need reimbursement for <u>Uber Service</u>?</i></p> <ul style="list-style-type: none">• The expense request must include:<ul style="list-style-type: none">- Screen shots of estimated Uber rate.-
<p><i>Account Information:</i></p> <ul style="list-style-type: none">• Please be sure to include the correct project information. There could be approval delays if this information is lacking required numbers or missing altogether.