

# CONCUR TIPS



# General Concur Tips

- Travelers must obtain an approved Concur request **prior** to any domestic or international business trip.
- Employees conducting travel within the DMV area, which does not include oversight accommodations, are not required to complete a travel request. They may be complete an expense report after the travel has concluded.
- [CISI Insurance](#) is provided to all travelers who sought prior approval through Concur and are traveling from the US to an international location.
- Detailed, itemized receipts are required for non-meal expenses.
- For receipts not in English, please identify the expense on the receipt for your department's review.
- Gasoline is allowable for car rentals only. When using a personal vehicle, mileage should be requested.
- Group travel requests are not possible in Concur although there is an option for an "[Event Request](#)". This request can be used to encumber expenses anticipated for an event or group of travelers. Once approved, the travel request number can be shared with individuals who have expenses related to the event or travel to create their individual [expense report](#). This option would NOT require individual requests in advance of the event.
- Travelers may participate in loyalty programs. However, UMD will not reimburse travelers for expenses paid using points, vouchers, gift cards, or other promotional payment methods.
- Only 12 month employees are eligible for travel reimbursements through payroll during the summer months (PPDS 26-3). Employees who are 9/22 or receiving only summer pay or summer research pay are considered non-employees during these pay periods and must process their reimbursements using the "UMD Travel and hosting – guest" expense [report](#).
- If the traveler does not anticipate any UMD funded charges for the trip, they should click the "No Cost trip" button on the report header. Do not include any estimated expenses on the request if the trip is a [no cost trip](#).
- Every Concur profile has a UMD credit card (ghost card) pre-loaded to use for air and rail reservations until you request a Tcard in your name. The UMD card should not be used for any other bookings.

# Airfare/Rail

- **Employees** are required to book air and rail through [Concur](#) or with the University contracted travel agency, [CTP](#).
- The [University Policy](#) is to "book the least expensive, practical itinerary". This might not always be the lowest cost flight if the traveler has scheduling issues.
- Flights booked through Concur and CTP have [agency fees](#) associated with them and must be included on the expense report.
- Premium seating may be allowable depending on flight duration and departmental approval. Please see airfare guidelines on the Travel & Card Services [website](#).
- Refundable ticket purchases must be documented and approved by the department.
- Most nonrefundable tickets are transferred to airline credits when canceled. The credit must be applied toward a future ticket within 1 year of the original purchase. Travelers who purchased the ticket out of pocket cannot be refunded for the unused ticket until the credit has expired.
- If you need to cancel an airline ticket originally booked in Concur, it can be done within Concur when you locate the itinerary in your bookings section.
- Federally funded travel may need to follow the [Fly America Act](#). It is the traveler's responsibility to select the appropriate carrier when booking flights in Concur. Speak with your department research coordinator or director if you need guidance on whether the trip account must follow the Fly America Act.

# Combining personal and business travel

Travelers including or extending for personal travel must provide a comparison for reimbursement prior to the trip start. It is not possible to obtain a comparison after the fact. When obtaining a comparison, the traveler should go through the airline booking process as if they were making the purchase without personal travel and then print screen the itinerary and cost.

- If the traveler is an employee, the comparison attachment must be included on the request **AND** expense report for approver review.
- If the traveler is a non-employee purchasing airfare on their own, they must provide documentation to the department prior to the reimbursement.

# Lodging

- Every effort should be made to ensure that lodging costs are reasonable and appropriate. The standard room rate should be used whenever available.
- AirBNBs/VRBOs and other private home rental expenses must **NOT** be charged to a UMD travel card. A personal card should be used and reimbursed after the trip.
- In-room movie, room service, pay per view, and any additional entertainment charges not included in the room rate will not be reimbursed. These are considered personal charges.
- UMD will not reimburse “no show” charges.
- Instate-lodging for employees must be documented on the request and prior approval.
- Lodging paid using vouchers, points, or gift cards are not eligible for reimbursement.
- The expense category for individual lodging in Concur is “Hotel/Lodging”.

# Travel Card

- The Travel Card should not be used to book travel until the travel request has been approved by the supervisor, fiscal officer, and PI (if the travel is supported by sponsored funding).
- Examples of allowable Tcard charges include airfare, rail, lodging, ground transportation, parking, and conference fees. Please see the [Expense Report](#) job aid for guidance on Tcard allocation.
- Examples of unallowable charges include Alcohol, expenses that should be charged to the Pcard, such as membership and tangible items that would become UMD property. Visit the [Travel & Card Services website](#) for questions on Tcard management and procedures.
- AirBNBs/VBROs must not be charged to the Travel card. A personal card should be used and reimbursed after the travel.
- Receipts are required for ALL travel card charges, regardless of the cost.
- Alcohol must NEVER be charged to a travel card.
- When using the Tcard for [Uber](#) or [Lyft](#), a business account must be created.

# Meals

- UMD uses Domestic and International GSA meal per diem rates for individual travel. The instructions for creating employee meal per diem expenses can be found here.
- If you use your Tcard for meals, you will need to account for this on your expense report using the meal per diem offset expense. Instructions on this process can be found here.
- Meals provided by the conference or outside source should not be requested for reimbursement.
- The University will reimburse meal per diem; not groceries.
- Meal reimbursements will be limited to the GSA rate for domestic travel, and foreign per diem rate for international travel for a single traveler. This applies even if you exceed per diem on a Tcard charge. The system will calculate what the traveler is eligible for, and if they overspent their allowance

# Local Hosting

Hosting usually involves a guest in attendance. The hosting policy, which outlines allowable and unallowable functions, can be found on the travel [website](#).

When hosting guests for a meal, these items must be added as attachments:

- Complete list of attendees - documented in [Concur](#)
- Meeting agenda and/or business purpose for the meal meeting
- Itemized AND credit card receipt