SHS Travel/Continuing Education Procedures—Concur

Introduction
Student Health Services uses Concur to process continuing education and travel requests, arrangements, and expense reports. The Business Office coordinates Concur activities, and assists staff with making travel arrangements and preparing requests and expense reports.

Expense types processed in Concur include:
- License Renewals
- Registration fees
- Online Training fees
- Hotel, airfare, meals, and other travel related expenses
- Mileage reimbursements

Note: If you are using Concur for the first time, you will need to set up your profile and assign your delegates. Please contact the Business Office at 458-8260 to set up your profile and assign your delegates.

Continuing Education
- Medical Professionals: See SHS Policy IV.3.2
- Non–medical staff: Continuing Education must be related to position duties. Please consult your supervisor before submitting a request
  - Supervisor approval based on appropriateness of training content and time/date of training.
  - Business Office approval based on remaining CE budget
- TAMU offers a wide variety of free workshops and classes. Contact the Business Office for more information

Concur Process
1. Submit Request. This will route to your supervisor for approval (permission to travel and/or use CE funds).
2. Make travel arrangements. Concur has built-in flight, hotel, and rental car booking tools available. The Business Office is happy to assist you in any way possible.
3. Attend CE event. Use your TAMU travel card when appropriate. Keep or take pictures of all receipts! Follow GSA guidelines for per diem rates and incidentals.
4. Create and submit Expense Report. The expense report is the document that initiates reimbursement.

1. Request—A request is needed for:
   - Continuing Education travel events (off campus)
   - Business travel events (off campus)
   - Payment or reimbursement for fees as part of your continuing education budget (license renewal, online subscriptions)
How to turn in a request

Log on to Concur → sso.tamus.edu → eTravel / Concur

Find the “Requests” Tab, Select

Select “New Request”
This will lead you to the request header. All fields highlighted in red need to be filled.

- **Trip Name/ Destination**: Name of your conference and the location
- **Trip Start Date**: First day of your trip
- **Trip End Date**: Last day of your trip
- **Travel Classification**: Employee- In State OR Employee-Out of State
- **Traveler Type**: Staff
- **Trip Purpose & Benefit**: Explain how this trip/expense benefits you and the University

**An Example:**

![Image of request header]

Be sure to save your Request Header.

Next, click on the expenses tab. Add your estimated expenses by clicking on the categories and saving.

![Image of expenses tab]

You will have to submit at least a $1.00 amount, even if there is no cost associated with the travel event. This will ensure the correct routing process of your request.
At this point, you have the ability to attach a file. This could be back-up information for a conference, training, or your license renewal letter.

Submit Request by clicking Submit Request button.

Accept & Submit after you read the FAMIS Request Submit Confirmation

The request will now route through the department. Tanja Peterson in the Business Office will verify that you have sufficient CE budget funds available. Then, the request will route to your supervisor, then to Randy Parker or Dr. Dannenbaum.

When the request is approved, the status will change to “Approved” and you can begin to make your arrangements. You will also receive an auto-generated email when the request is approved.

Please note: The Request is only the first step. You will not get reimbursed by only turning in the request. It is the authorization to travel or to use your continuing education funds.

2. Arrangements

Conference Registration
- Use Texas A&M travel card or personal credit card to register for conference. Keep receipt!
- If using Texas A&M travel card, make sure you have sufficient CE funds available. If CE funds are not available, you will need to reimburse the University.

Airfare
- Use Concur booking tool or book with airline directly. Do not use third-party vendors such as Expedia.
- If booking through Concur, travel iteration will be saved in Concur and backed up by a travel agency.
- General guideline for flying out of CLL: Compare to AUS or IAH and if less than $150 more, it is ok to fly out of CLL. Mileage and airport fees add up quickly.

Rental Car
- Book in Concur to ensure best rate and insurance policy.
- Can also be utilized for non-business travel- use personal credit card.
- TAMU has contracts with Hertz and Enterprise

Hotel:
- Make reservation through hotel if there is a conference hotel (special rate)
- For all other hotels, use the Concur booking tool. It will give you the best state employee rate guaranteed
- Make sure to submit the state hotel occupancy tax form at the time of check out and double-check that hotel does not charge for state occupancy tax.

The Business Office will be happy to assist you in finding the best airfare, hotel rate, make reservations, etc. Please call ahead and make an appointment before you come down. It can get complicated and take up to 30 minutes to complete.

3. Travel
- Keep all receipts or take pictures and upload them directly to Concur
- Receipts need to be itemized (show each line item of what you had to eat and drink)
- Do not exceed the per diem for meals and incidentals- your per diem amount can be found on your request or here: https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup
- Alcohol is not reimbursable- use your personal card or cash
- For in-state travel, the state occupancy tax is not reimbursable. State Hotel Occupancy Tax form can be found on the SHS website under staff resources.
- Taxes are reimbursable on meals.
- For out-of-state travel, all taxes are reimbursable.

4. Expense Report
After you return from your travel event, you need to submit an expense report. This report will combine all expenses for the event in one report. This is important, as we have to pay a fee per report submitted.

How to create an expense report:
   1. Select your request
2. Create expense report

This will populate the report header with the information you provided in the request.

You will need to select your:

- Account number (302970-xx000) - the last five digit is your support account for the unit you work for, i.e. 21000 for Medical Clinic or 32000 for Pharmacy. There will be a drop down you can select from.

- Account Attributes: Local

- Save

This will take you to the expense tab.
To add your expenses to the report, click
- New Expense, select a category, i.e. “Conference Registration”. Fill in the required fields

You now have the ability to attach a receipt. To attach a receipt, scan the receipt to your PC, save to your desktop, browse, and attach.

You will be able to add more receipts, calculate your mileage reimbursement, etc., all within the system.
  - Click submit report (top right corner)

Your report will then route to the Business Office and to Randy/ Dr. Dannenbaum for approval. After the department’s approval, the report will route to FMO for review. The FMO travel auditor will contact you directly if any information is missing/ not clear. Please make sure to check your emails frequently. Feel free to contact the Business Office with any questions.