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. (See instructions for Concur-Delegates)**

**Continuing Education**
- Continuing Education must be related to position duties. Please consult your supervisor before submitting a request. A Concur request should be submitted and approved prior to making purchases/attending events.
  - Supervisor approval based on appropriateness of training content and time/date of training. Business Office approval based on remaining CE budget.

**Concur Process**

1. Submit Request. This will route to your supervisor for approval (permission to travel and/or to use CE funds). A Concur request should be submitted and approved prior to making purchases/attending events.
2. Make travel arrangements if travelling. 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 travel event or complete license renewal/online CME course. Use your TAMU travel card for payment once Concur request is in Approved status. Keep email confirmations and receipts of all purchases to coordinate with each expense! Follow GSA guidelines for per diem rates and incidentals. (Business Office can help you find this information)
4. Create and submit Expense Report. The expense report is the document that initiates reimbursement.
1. **Request**—It is best practice to receive verbal or email approval from your supervisor prior to submitting a request in Concur.

   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 [sso.tamus.edu → SSO MENU → Concur](#)

![SSO Menu](image)

Find the “Requests” Tab, Select

![Concur Login](image)

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 (If for CME, list as Continuing Education or Nursing License Renewal, etc.)
- **Trip Start Date**: First day of your trip
  - If you are doing an online Continuing Education course, you can use today’s date.
- **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 in detail the purpose of the trip/license renewal or continuing education. Do not use abbreviations for associations or credentials if possible. We will also need to note whether travel is required or not, and notate how the license and/or trip is beneficial to your position.

*Example*

Be sure to save your Request Header.
Next, click on the **Expenses** tab.

Add each of your estimated expenses by clicking on the categories and saving.
- License Renewals and Continuing Education can be put under the “Dues” category.

**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.**

Submit Request by clicking the orange “Submit Request’ button.

**Accept & Submit** after you read the FAMIS Request Submit Confirmation.

After submission, the request will route for administrative and university approval. The Business Office staff will verify that you have sufficient CE budget funds available.
When the request is approved, the status will change to “Approved” and you can begin to make your arrangements/purchases. 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 TAMU travel card or personal credit card to register for conference. Keep receipt!
- If using TAMU 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 itinerary 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.
- 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)
- Before travelling, contact the Business Office to find out your GSA per diem rate for meals and incidentals. Please note that if you exceed your daily allowance, you will be responsible for paying the difference.
- Alcohol is not allowed to be put on your TAMU card – this must be a personal expense
- For in-state travel, the state occupancy tax is not reimbursable. A State Hotel Occupancy Tax form can be found on the SHS website under staff resources or from the Business Office staff. The employee travelling is responsible for providing this form to the hotel upon arrival or check out to have this tax waived.
- Taxes are reimbursable on meals.
- For out-of-state travel, all taxes are reimbursable.

4. Expense Report

After you return from your travel event or complete your CME courses, you need to submit an expense report. If you have used your TAMU travel card, it will usually take a few days for the charges to feed into the Concur profile.

How to create an expense report:

1. Select your request

   ![Image of Concur dashboard]

   *Just click on the 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 digits are 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. Please ask the Business Office if you are unsure.
- Account Attributes: Local

- Save

This will take you to the Expense tab.
*If it has been a few days since you made the purchases on your TAMU card, there is a good possibility the charges will show as “available” in Concur. To find this, click on Import Expenses – Available Expenses From File. This will allow you to select and move the available expenses to the current report you have created.

If you are needing to add expenses to the report not made on your TAMU card (for example: if you paid out of pocket with your personal card and are requesting reimbursement), click
- New Expense, select a category, i.e. “Conference Registration”. Fill in the required fields.

You will need to attach a receipt or some proof of payment. To attach a receipt, scan the receipt to your PC, save the file to your desktop, browse, and attach. We encourage staff to use the Concur Mobile App to track expenses, upload pictures of receipts, etc.

You will be able to add more receipts, calculate your mileage reimbursement, etc., all within the system. Please let the Business Office staff know if you need any assistance before submitting.

- Once completed, click “Submit Report” (top right corner)

Your report will then route 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.