



CONCUR



Frequently Asked Questions
Updated June 4, 2019

Table of Contents

REQUESTING TRAVEL (PRE-APPROVAL)	3
BOOKING TRAVEL	5
EXPENSE REPORTING	6
TRAVEL CARDS (T-CARDS)	7
DELEGATES	8
GUEST TRAVEL	9
DUTY OF CARE	10
COMPANY BILLED STATEMENTS (P-CARDS)	11
PROJECT CUTOVER.....	12
ADDITIONAL CONCUR FAQ.....	13

REQUESTING TRAVEL (PRE-APPROVAL)

When is preapproval required?

The University is requiring preapproval for any travel that includes segments (airfare, hotel, or car rental) regardless of cost.

Trip Type	Request Required
In-State (Without Segments*) ¹	Not Required ²
In-State (With Segments*)	Required
Out-of- State (Without Segments*) ¹	Not Required ²
Out of State (With Segments*) ¹	Required
International	Required

* Segments include airfare, hotel, and/or car rental

¹ Trip Type cannot be selected if Request includes any Segments (Air, Hotel, and/or Car Rental)

² System will allow them to submit a Request for Duty of Care Purposes

What approvals are required to request travel?

Travel requests require approval by the traveler's direct supervisor as well as the Fiscal Officer(s) of the accounts being requested. Additional approval may be required depending on your destination (e.g travel to high risk countries, banned states, etc.).

How will the traveler be informed that their travel has been pre-approved?

The system will send the traveler a notification (via email) that their request is approved.

Will flights/hotels be allowed to be booked within Concur if there is no preapproval?

No.

What happens if you do not request preapproval prior to your trip?

Expense reports that contain segments (airfare, hotel, or car rental) without a linked approved request cannot be submitted. Travelers will need to submit a request post-trip. To discourage requests being submitted post-trip, they will route for additional higher-level approvals.

If a traveler experiences unforeseen circumstances while travelling (e.g. flight delays/cancellations, unexpected out of pocket expenses, etc) will the preapproval request need to be updated?

No. Preapproval requests are estimates. Any unforeseen travel changes should be handled by calling Key Travel. For other travel related expenses, the traveler may use their T-Card or pay out of pocket and submit for reimbursement.

Are KFS account numbers required on the preapproval?

Yes, the traveler is required to identify which KFS account(s) they plan to charge their trip in order to route to the proper Fiscal Officer. However, the traveler has the option to reallocate their expenses on their expense report post trip.

Do non-travel expenses that are purchased on a T-Card require preapproval within Concur?

Non-travel expenses (e.g. business meals, etc.) do not require preapproval within the system. Whether a T-Card or a personal card is used, reimbursement will be requested in Concur and will be subject to required approvals.

What would warrant a disapproval on a preapproval for travel?

All travel requests are handled individually and may be returned to the requester by the designated approver for a variety of reasons (e.g. funds not available, no coverage in the office, etc). Upon a disapproval, the user must enter a comment which is subsequently sent to the requester/traveler. If appropriate, the traveler may update the request and resubmit.

BOOKING TRAVEL

Are travelers required to book their travel via the Concur online booking tool or through Key Travel?

It is strongly recommended that travelers book within the system to ensure compliance with University Travel Policies and to take advantage of negotiated rates with preferred vendors. Additional benefits to the traveler are available on the Concur Project Website (<https://concurproject.uconn.edu/home/>)

Can a traveler book travel within the system using a personal credit card?

All University airfare that is booked via the online booking tool will be charged to the University's business travel account (lodge card). Should a traveler need to pay for airfare using a personal credit card, they will need to call Key Travel to book the flight.

For all other segments booked via the Concur online booking tool, transactions will be charged to the card stored in the traveler's profile. This card may be a University T-Card or a personal credit card.

Can a traveler direct bill their hotel and/or car rental?

No. Only airfare will be direct billed. All other expenses should be charged to a T-Card.

If a traveler is receiving partial funding for a trip, how should segments be booked?

The traveler has two options to handle this scenario:

1. The traveler can pay for all expenses out of pocket (e.g. using a **personal** credit card, cash, etc) and submit for their partial reimbursement once all travel is completed.
2. The traveler can call Key Travel directly and request that the payment for each segment be split between the University's lodge card and their **personal** credit card.

Will flights being booked to a grant account be reviewed for compliance with Fly America?

Yes. Key Travel will review bookings for Fly America compliance.

How should travelers secure/guarantee hotels and car rentals?

All hotel and car rental reservations made through the online booking tool will be secured using the card stored within the traveler's Concur profile.

NOTE: Expenses incurred on a personal card or paid for out of pocket can only be submitted once the trip has been completed.

What is the difference between a pre-payments and deposits for hotel reservations?

Pre-payments are usually non-refundable full payment of the stay, paid at the time of booking. Per State statute, travelers are not allowed to prepay for hotel reservations.

Deposits are usually refundable (based on the cancellation policy of the hotel) and only require a partial payment.

EXPENSE REPORTING

What approvals are required to receive reimbursements?

Expense reports require approval by the direct supervisor as well as the Fiscal Officer(s) of the accounts being charged. Additional approval may be required for grant accounts (i.e. PIs and SPS).

If a traveler books a flight on a personal credit card, can they then submit a receipt for reimbursement?

Airfare expenses incurred on a personal card or paid for out of pocket can be submitted for reimbursement, with the appropriate supporting documentation, once the trip has been completed.

What happens if a traveler's expense report exceeds the amount on the request?

The requested amount is an estimate. Actual expenses will be reviewed and approved by the direct supervisor and the Fiscal Officer of the account(s) being charged.

When do travel expenses post to KFS?

Expenses are posted to KFS/the general ledger (GL) once the expense report is fully approved in Concur.

Will pending expenses be encumbered?

Pending expenses will not be automatically encumbered in KFS but reporting is available within Concur to view these expenses.

TRAVEL CARDS (T-CARDS)

Who is allowed to request a T-Card?

All permanent employees as well as graduate assistants (GAs) are eligible to request a T-Card.

What approvals are required to get a T-Card?

T-Card requests require approval from the requester's direct supervisor as well as a dean, director, or department head.

What is the lead time for acquiring a T-Card? How long does it take from application to receipt of card?

Once the application is approved, it takes 7 – 10 business days for the T-Card to be received by the University.

Are T-Cards prepaid cards?

T-Cards are not prepaid cards; they will function similarly to P-Cards. T-Cards will have credit limits based on the frequency of travel and specific travel needs.

Is it possible for the department to have one T-Card or should faculty have their own?

T-Cards are designed for individual assignment and use.

Can students get T-Cards in place of per diem cards?

No, students should continue to get per diem cards.

If a traveler does not apply for a T-card, will the hotel and car rental expenses be added to the cash advance?

No.

When can employees request a T-Card?

Employees will be able to request a T-Card as soon as the Concur system is available to the University. The exact date will be communicated in the near future.

DELEGATES

Can employees assign another employee to act on their behalf within the system?

Yes, with the following considerations:

Preparing request and expense reports:

- Delegates may assist with the preparation of travel requests and expense reports.
- Delegates are **not allowed** to submit travel requests that contain cash advances
- Delegates are **not allowed** to submit expense reports on behalf of the traveler

Booking travel

- Employees may assign a Travel Arranger to assist with the booking process.

Approving request and expense reports

- Delegates may assist with the approval of travel requests and expense reports.
 - NOTE: Approval delegation may be assigned to other employees that have the approver role within Concur.
 - The Previewer role allows a non-approver to assist with the review of request and/or expense reports. This role may be assigned to anyone with a Concur profile.

Can delegates see expenses for the traveler they support during their trip?

Yes, you may act on behalf of the traveler at any time to see what has been uploaded and/or added to their expense reports.

GUEST TRAVEL

How will guest travel be booked?

Departments are required to obtain preapproval for guest travel via Concur Request. Once the request is approved, travel must be booked directly with Key Travel. Departments may allow guests to call Key Travel with the approved request ID or the department can call to book on their behalf.

How will guests be reimbursed for their out-of-pocket expenses?

Guest reimbursements will continue to be handled via HuskyBuy.

Will expense reports need to be submitted in Concur for non-employees (guests)?

No. Expense reimbursement for non-employees will remain the same process as it is today through HuskyBuy.

Do non-employees (guests) still have to be set up as vendors for reimbursement?

Yes, this process will remain as it does today.

DUTY OF CARE

What is Duty of Care?

Duty of Care enables UCONN to know where employees and students will be traveling to, and in the case of an emergency, communicate with travelers to ensure their safety and/or provide safety instructions.

How does the University know where travelers are in case of emergencies if they have multiple destinations?

The **segment tab** of Concur's request will help the University know where the employee is traveling to and on what dates. In addition to Concur Request, travelers are encouraged to forward any itineraries that were booked outside of the University's travel management company to plans@concur.com.

COMPANY BILLED STATEMENTS (P-CARDS)

Will P-Card reconciliation be done in KFS or Concur?

Starting in January 2020, P-Cards will be reconciled in Concur. Until then, the current process in KFS will remain in place. More information and training will be available in the fall of 2019.

PROJECT CUTOVER

Will you have more town hall meetings?

Yes! Additional town halls, training opportunities, and other change management activities are forthcoming. Please check the project website for more information.

When will travelers need to stop using Sanditz?

More information on the exact date for when travelers should begin using Concur will be available soon.

Can we link our departmental website to a site that provides info about Concur, T-cards and the new Travel policies?

Yes! <https://concurproject.uconn.edu/home> will have the most up to date project information for all of the university.

When will training be available for travelers?

A training schedule will be published as we get closer go-live. You may register online for the appropriate training session at that time. Additional documentation will be available online such as user guides and video tutorials. You may also call the UConn Procurement Services Center at 860-486-2BUY or email concursupport@uconn.edu at any time for assistance when booking travel.

ADDITIONAL CONCUR FAQ

Will employee profiles be preconfigured within Concur?

Yes, every University employee will have a profile within Concur. However, the information will not be copied over from their current Sanditz profile. All travelers will need to review their profile before booking travel and they may add additional personal information at that time (e.g. airline/hotel reward accounts, etc).

How does one route request and/or expense reports for additional approval?

Approvers will be able to approve and forward any request and/or expense report to another user as long as they have the approver role within Concur.

Who will be granted the approver role within Concur?

Direct Supervisors, Fiscal Officers (FOs), Sponsored Programs, Global Affairs, and Export Control

How will the University pay for conference registration fees?

Conference registration fees should continue to be paid using a departmental P-Card.

How will departments be able to request reports that are not available via the Concur canned reports?

The project team is still working on the finalized process for requesting reports going forward. We will update the FAQ and provide information on our website when it is available.