CONCUR | CREATING A PERSONAL CAR MILEAGE EXPENSE REPORT

OVERVIEW

This document provides instruction for creating a personal car mileage expense report, a previously approved travel request is not needed for a report containing this expense type and other Non-Segment (Non-Airfare, car rental, hotel or Amtrak rail) expense types.

NOTE: If daily mileage expenses are incurred, expense reports should be created on a weekly or monthly basis, rather than daily.

LOGGING IN

1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.

CREATING AN EXPENSE REPORT

Expense reports with personal car mileage expenses only must be submitted at least on a monthly basis. Each day’s mileage expense must be entered as a separate expense line item.

Starting from the Expense Module


REPORT HEADER

1. Enter the Required fields as noted by the red line to the left of the field.
   a. Trip Name
   b. Business Travel Start Date, Business Travel End Date
      NOTE: If you are completing this report on a monthly basis the Business Travel Start Date and Business Travel End Date should reflect the entire expense period. Otherwise enter the date of your actual expense here for single day reports.
   c. Trip Purpose
   d. Travel Award No. when applicable.
      NOTE: When applicable, UCPEA award letter must be attached to expense report prior to submission.
   e. Traveler Type
   f. Trip Type
   g. Personal Travel fields. If Personal Travel is Y, specific dates should be entered in the Personal Travel Dates field.
   h. Business Purpose/Justification and Account Number where you will give a brief description of how the trip benefits the university.
   i. Account Number (this is your KFS Account Number), Account Organization 1,2,3 and Sub-Account Number if your account has one.

2. Click Next. The Are you claiming meal or lodging per diem pop-up displays.
3. Click No, since this will be a personal car mileage only expense report.

ENTERING PERSONAL CAR MILEAGE

The personal car mileage expense will automatically calculate based on the Home and Work address, which should be saved to your profile.

1. With the expense report open, click New Expense.

2. Then select the Personal Car Mileage expense type.

3. If stored in your profile your home address will be prefilled in the first box.

4. Enter all the Waypoints (Destinations) that you drove to on that day.

NOTE: You can include the address for any personal stops (for example if you have driven far off route to a restaurant location for lunch) if you wish to get the most accurate mileage calculations and then click the check mark to note that leg was personal to the right of the box. However you can also choose to omit those stops from the mileage calculator.

5. At the bottom left of the page click Deduct Commute.

6. Scroll further down the page to view the Deduct Commute Distance section.

7. This will display your Home and Office address as listed in your profile.

8. If you departed from home and returned to home on that day you would click the checkbox to Deduct Roundtrip to the right of the address box.

9. Click Add Mileage to Expense

10. Scroll to the bottom of the page to view the Mileage Calculator again if you need to make changes.

11. Click Save.

NOTE: The reimbursement amount is automatically calculated based on the date, miles driven, and the predefined reimbursement rate.
12. Click **Save Expense**.

**COPYING AN EXPENSE**

Recurring or daily personal car mileage expenses can be copied from a previous expense and then updated for the new expense item.

1. With the expense report open, select the **expense** you want to copy by clicking the checkbox to the left of the expense line item.

2. Click **Copy**.

The new expense is added to the **Expenses** list with a date one day later than the original expense.

3. Click the new expense line item to open the new expense that was copied.

4. Review the details of the expense to confirm accuracy for the new expense item.

5. Modify applicable fields for the new expense where allowed, as necessary.

6. Once updated, click **Save**.

7. On the expense report page, click **Submit Report**.

The **Report Totals** window displays.

8. Review the information for accuracy, and then click **Submit Report**. The **Report Status** window appears.

9. Click **Close**.

**NOTE:** If you have not met policy requirements when completing the details of your report, a message will display describing the report error or alert. Correct the error, or if you require help to complete the task, contact your Concur administrator.

**ADDITIONAL SUPPORT**

For help with Concur, contact [travel@uconn.edu](mailto:travel@uconn.edu).

For additional reference material, refer to [https://concurproject.uconn.edu/home/](https://concurproject.uconn.edu/home/)