CONCUR TRAVEL AND EXPENSE NEWSLETTER

OCTOBER 2021

WHAT'S NEW:

By popular request, a new QRC titled Travel Expenses Charged to the Procard has been created and added to the Concur Travel and Expense Website, providing further guidance to Concur users in selecting appropriate Travel related Expense Types and Traveler Types when creating a Concur Travel Expense Reports.

NEW PROCUREMENT CARD TRAINING REQUIREMENT

The University Finance and Administration Training Transformation Initiative has announced that all standard procurement cardholders are required to complete procurement card training. Current standard cardholders will have until March 31, 2022 to complete the training. If you have questions regarding the required training, please see the Finance and Administration Training Transformation Initiative website.

NEW UNIVERSITY FLEET FUEL CARD POLICY

The new policy regarding the University's Fleet Fuel Card (Voyager Fleet Card) has now been published as BPM E-7-19. Effective in October 2021, once the Voyager Fleet Card has been received in the department. the procurement card should no longer be used to purchase fuel for University owned or leased vehicles. The procurement card should only be used to purchase fuel for short-term car rentals and car rentals while in travel status for University business. The procurement card or the fleet fuel card should never be used to purchase fuel for an employee's personal vehicle.

EXPENSE REPORT TRAINING AND INFORMATIONAL RESOURCES

It is strongly encouraged for every cardholder/traveler/delegate/approver to review the Concur specific training videos. The training videos are helpful step-by-step tutorials, providing guidance in preparing Concur Reports. The following videos can be located when signing into MyUK Learning and searching the following titles in the MyUK Learning search engine:

- Introduction to Concur Travel and Expense Management
- Concur: Review and Complete User Profile Settings
- Concur: Creating a Travel Request
- Concur: Creating a Travel Expense Report without a Travel Request
- Concur: Create a Travel Expense Report from a Pre-Approved Travel Request
- Concur: Expense Reporting for Procard Transactions
- Concur: Approval Process and Workflow

For additional reference material, the information from the videos is further emphasized and documented in QRC format and located on the Concur Travel and Expense website.

University of Kentucky

HOW TO ENSURE SUCCESSFUL REPORT SUBMISSIONS

To avoid unnecessary returns of Concur reports, the following three items have been identified as leading causes of returned reports. Prior to submitting a report to Accounts Payable Services (APS), cardholders/travelers, delegates, and approvers should review all transactions on each report and resolve issues with:

Procard:

- Missing or invalid documentation. Itemized receipts must be included when documentation is required. *
- Missing or inadequate business purpose. *

* See the Procurement Cardholder Manual for a definition of an itemized receipt and a business purpose.

Travel:

- Claiming expenses not allowed by University of Kentucky travel policy E-5-1.

QUESTIONS?

Questions or requests for assistance should be emailed to concurexpense@uky.edu. Emails should be as detailed as possible and need to contain screen shots when appropriate to assist with responses to your questions.

Visit the UFS Concur Travel & Expense Management website for Concur Quick Reference Guides and FAQs.

To see past issues of the Concur newsletter please click here.