

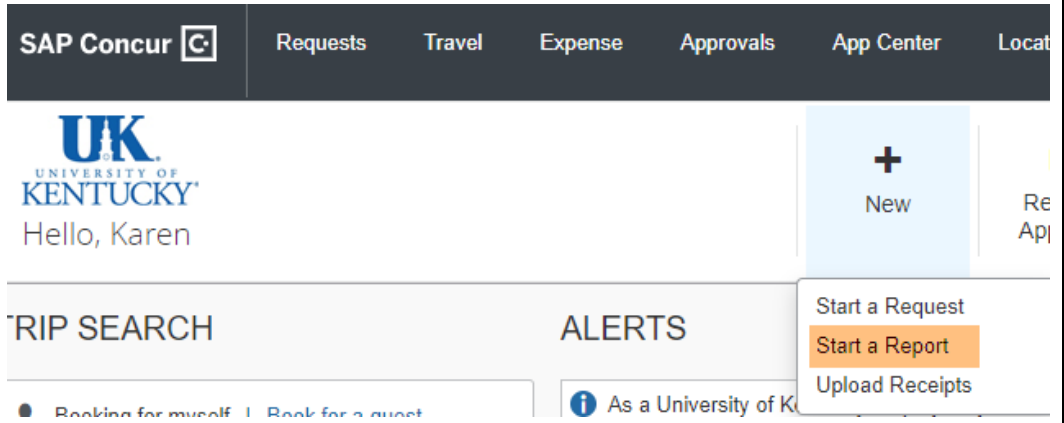
## Concur – Which Policy Should be Used?

**Process:** When creating a new expense report, the first step is for the user to decide which policy should be used.

### Procedures

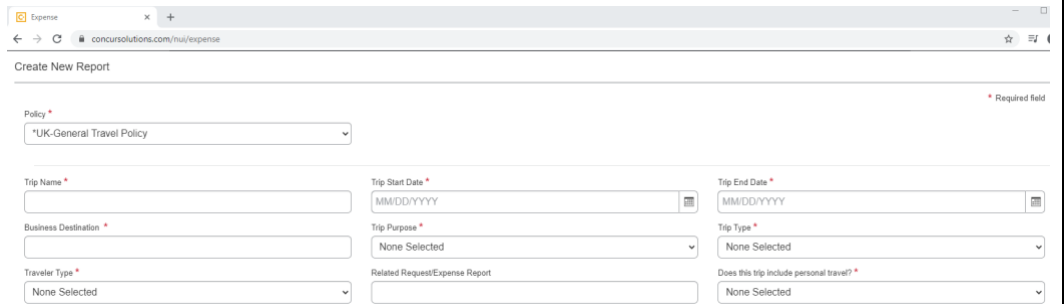
#### Create a New Report

- Start a Report by clicking on the New menu item in the UK Quick Links Bar:



#### Create New Report

- The Create New Report form will appear.



Quick Reference Card – Which Policy Should be Used?

**Choose the Policy that will be used for the report**

- From the drop down list under Policy, one of the following policies will be chosen:
  - UK-General Expenditure Policy
  - UK-General Travel Policy

Create New Report

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Policy \*

A screenshot of a dropdown menu. The menu is open, showing four options: '\*UK-General Expenditure Policy', 'None Selected', '\*UK-General Expenditure Policy', and '\*UK-General Travel Policy'. The second and third options are highlighted in blue.

- The choice of policy will depend on who made the purchases and whether the purchases were non-travel or travel related. A summary of the policies are shown below:

**UK General Travel Policy**

- \*Employee using own procard for travel or when the employee needs reimbursement for own travel expenses
- \*Travel where an employee utilizes their procard to pay for the expenses of an individual or group with whom the employee is traveling

**UK General Expenditure Policy**

- \*Travel expenses purchased on behalf of another person or group
- \*Procurement card charges for non-travel expenses

## Quick Reference Card – Which Policy Should be Used?

	<ul style="list-style-type: none"><li>• The questions below can help to determine which policy is appropriate for the expense report:<ul style="list-style-type: none"><li>○ Are the expenses travel related?<ul style="list-style-type: none"><li>▪ No – use the UK General Expenditure Policy</li><li>▪ Yes – go to the next question</li></ul></li><li>○ Did the “traveler” pay for their own trip expenses using a UK procard in their name?<ul style="list-style-type: none"><li>▪ Yes – use the UK General Travel Policy</li><li>▪ No – go to the next question</li></ul></li><li>○ Who made the travel purchases?<ul style="list-style-type: none"><li>▪ Employee while in travel status who will claim the expenses on their travel expense report – use the UK General Travel Policy</li><li>▪ Employee not in travel status who made the purchases on behalf of the traveler – use the UK Expenditure Policy</li></ul></li></ul></li></ul>
<b>Special Notes for each policy</b>	<ul style="list-style-type: none"><li>• <b>UK General Expenditure Policy</b><ul style="list-style-type: none"><li>○ <b>Do not submit an expense report for each procard expense.</b> One monthly expense report should normally be completed for most campus units. Areas with a large volume of expenses such as a centralized processing unit for a college may submit weekly or biweekly expense reports.</li><li>○ Only procurement card expenses are allowed on this policy. Employee reimbursements for non-travel related expenses should be processed via PRD.</li><li>○ If there are both nontravel expenses and expenses purchased on behalf of a traveler, all of the procard charges can be submitted on the same expense report.</li></ul></li><li>• <b>UK General Travel Policy</b><ul style="list-style-type: none"><li>○ Can be used for both procurement card expenses or other payment methods. Reimbursement of travel expenses such as out-of-pocket expenses or mileage should be included on the expense report. The option to add payments by third parties or payments made by UK on PRD/PO can also be utilized when required by a sponsor or department to give a complete picture of the entire trip.</li><li>○ Each trip should have a single expense report with all of the expenses related to that trip.</li><li>○ Trips with multiple legs should be submitted on the same expense report, even if the trip mixes domestic and international travel.</li></ul></li></ul>

<p><b>Examples of scenarios included on each Policy</b></p>	<ul style="list-style-type: none"><li>• <b>UK General Expenditure Policy</b><ul style="list-style-type: none"><li>○ Monthly procard expenses include supplies for lab animals, test tubes, and a replacement part for a small microscope.</li><li>○ An employee stationed in Lexington registers for a conference held by the Kentucky Teacher’s Association at the Lexington Convention Center.</li><li>○ A business meal was held at the Olive Garden in Lexington that included 15 participants from area schools.</li><li>○ An employee travels to India to attend a conference and the conference registration is purchased using an administrative assistant’s procard on the behalf of the traveling employee.</li><li>○ The debate team travels to Georgia. Hotel and bus expenses are paid using the procard of a UK staff member who is not going on the trip.</li></ul></li> <li>• <b>UK General Travel Policy</b><ul style="list-style-type: none"><li>○ An employee travels to India to attend a conference. Expenses include hotel, airfare, meal per diem, and a notebook purchased while on the trip for notes.</li><li>○ Agriculture extension employee travels to Louisville on County Business and pays for hotel out-of-pocket. Employee receives per diem and personal car mileage.</li><li>○ The debate team travels to Georgia. Hotel and bus expenses are paid using the procard of the UK employee who went on the trip with the team.</li></ul></li></ul>
<p><b>Questions</b></p>	<ul style="list-style-type: none"><li>• Questions Contact Customer Service:<ul style="list-style-type: none"><li>○ Email – <a href="mailto:concurexpense@uky.edu">concurexpense@uky.edu</a></li><li>○ <b>Web Inquiry</b> –</li></ul></li></ul>