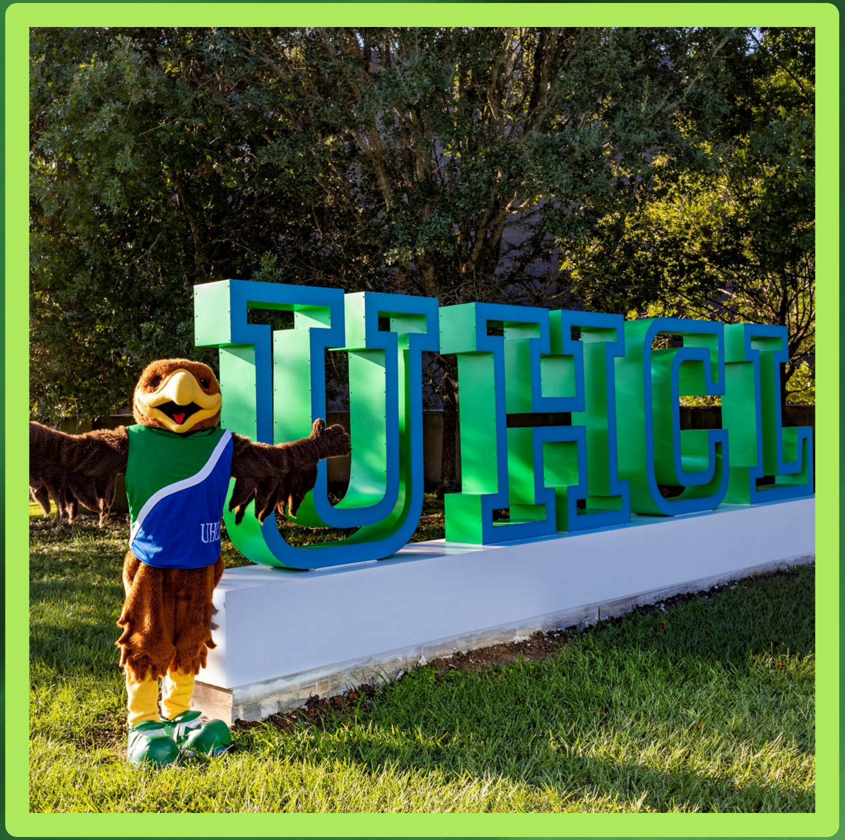
Concur Travel

Inspire Higher



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Overview

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Concur Overview

- Concur is UHCL’s new travel software that automates travel planning, ticketing, and expense reporting. It is the existing Concur North America platform.
- The software is accessible 24/7 online, or by mobile app.

Concur

Concur

Registration

Conferences

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Online Booking

Delegate

Travel Card

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How to Register for Concur Access?

- All travelers must be **self-registered** in Concur prior to travel
- Self Registration for Concur is through our UHCL E-Services P.A.S.S. webpage
  - 24-hour/overnight process for approval
  - Approval e-mail will be sent to the employees work e-mail
- After approval email is received, travelers can access Concur through:
  - UHCL E-Services > P.A.S.S.
  - www.concursolutions.com
- Additional Registration
  - Vendor ID Set-Up must be completed prior to travel
    - Request Department to send an Invite to set-up Vendor ID
    - Complete this task at least **30-days in advance** of travel
    - This ensures your direct deposited reimbursement

Conferences

- Conference registration and payment are typically required **in advance** of the event.
- We recommend that attendees pay for the conference using their **Travel Card** or **P-Card**.
  - Other options include payment by **Departmental voucher** or **employee personal credit card**
- Personal credit card expense is reimbursable with **proof of event cost and receipt**.
- **Detailed Conference Agenda** must be attached to your Concur Travel Request prior to submission.
- **Include Lodging Cost estimate** on the Concur Travel Request for approval. The associated expense for this Lodging must subsequently be processed in your Concur Travel Request.

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Travel Request

- **Travel Request must be fully approved prior to travel.**
- **To submit a Travel Request:**
  - Login to Concur, **click** Start a Request
  - Document ID must be your Last Name and First Initial. + Travel Destination + Last day of Travel
    - Example: **SmithJ.Dallas092125** **[Starting September 1]**
  - **Enter** purpose, benefit, personal days (if applicable), start/end dates, cost center information and expected expenses (Lodging, Transportation, Mileage, Meals, and other incidentals).
    - Tip: Cost Center information can be retrieved from your DBA/CBA
  - **Attach** required uploads
    - Conference Agenda is required if attending a Conference
    - Signed & Approved Embargo Form & CITI Training Certificate is required for ALL International Travel
  - **Submit** the completed request for approval
- Check the status of your Travel Request on your **Concur homepage**

Travel Expense Report

- Travel expenses must be submitted within 15 days of returning from trip (exceeding 60 days will result in Tax reporting w/ a completed Exhibit B).

- To submit a Travel Expense Report:
  - Login to Concur, **click** Start a New Report
    - **Create** from an Approved Travel Request (choose the Request to use, and Click Create Report)
  - Enter an Itinerary that documents **every date and city visited** for travel allowance calculation within the software.
  - **Enter all expenses** one at a time, by "Adding Expense" (Ex: Lodging, Transportation, Mileage, Meals, and other incidentals)
    - Mileage TIP: **Use the Mileage Calculator**
  - Attach required uploads
  - **Itemized** Receipts
  - **Submit** the completed expense report for approval.

- Check the **status** of your Travel Expense Report on your **Concur home page**.

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Online Travel Booking

- The following online reservations and ticketing is available in Concur:
  - Flight/Rail
  - Auto Transportation
  - Lodging.

- Be advised there are associated fees per transaction with booking one or more of the above in Concur.
  - It is advised to book reservations through **other online resources**
    - Example: conference room blocks, airline/hotel websites, car rental websites, etc.

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Non-Employee/Student Group Travel

- Non-Employees/Students require the assistance of a **Concur Delegate** to process Concur submissions.
- Non-Employee Concur Travel Access Form **must be** completed for a Delegate to be assigned.
- It will be the **Concur Delegates**' responsibility to complete and submit all Concur reporting (request & expense report).
- Student Group Travel **requires** that **each individual student** have a Concur Delegate to submit a Concur Travel Request and an Expense report.
- For Student Group Travel please refer to: SAM 05.C.03

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Travel Card

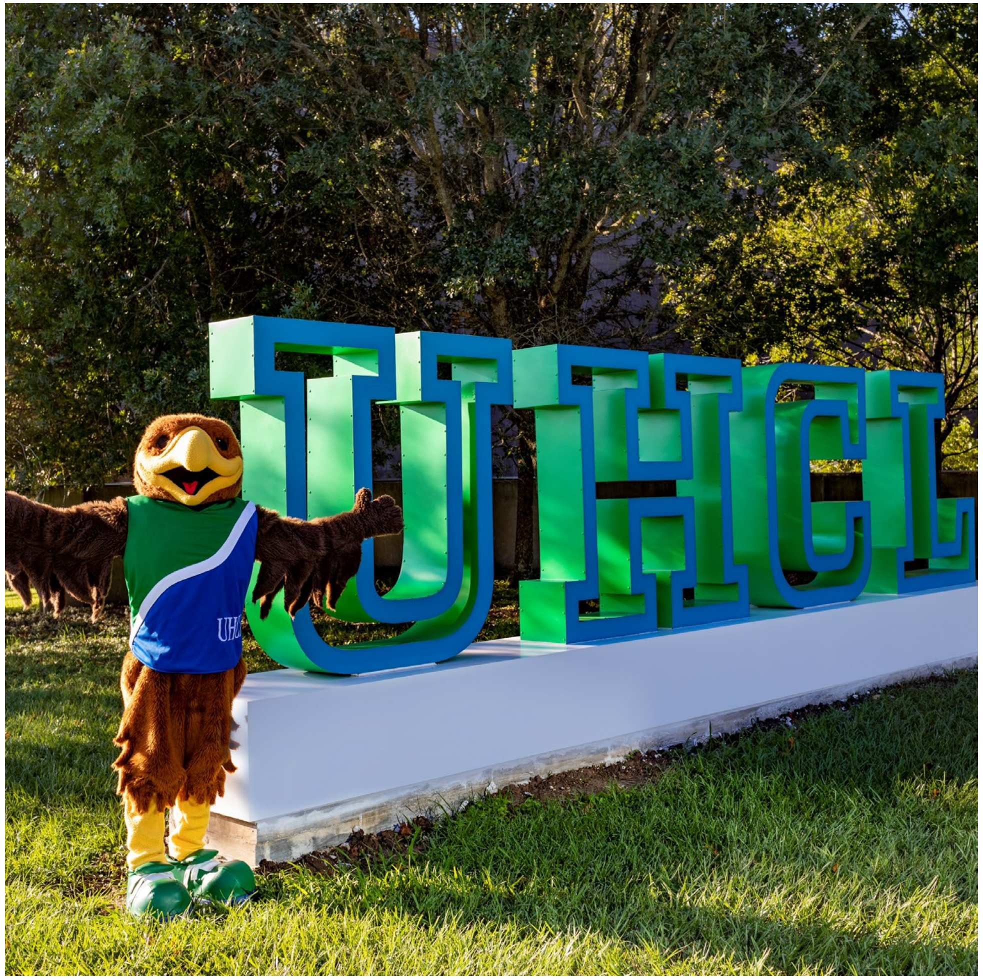
- To request a Travel Card please complete the Travel Card Application online (Docusign).
- All Travel Card purchases during each trip **must be linked** to its corresponding expense report (Travel Cardholder must have a Vendor ID).
- Allowable Travel Card Expenses:
  - Airfare
  - Hotel
  - Rental car
  - Gasoline for rental car
  - Conference Registration
  - Travel meals for traveler only during an overnight trip
  - Travel Incidentals
  - Books, supplies, or other materials needed while traveling

What's new in FY 2026

- Meals-Actual
  - Meals actual are reimbursable up to the allowable GSA rate for your destination
  - No receipt required for Meals up to the allowable GSA rate for your destination

- Travel Website makeover
  - New Helpful Guides have been uploaded

- Concur Hands-On Travel Training
  - Offered during HR Hawk Power Hour



Travel Office Resources

- https://www.uhcl.edu/about/administrative-offices/travel/
- 281-283-2270
- concurtravel@uhcl.edu
- Hands-On Training offered during Hawk Power Hour.
- Office Hours: Monday-Friday, 8:00am-5:00pm