

## Tips for Expense Reimbursement in SLAC's Concur Travel System

### Initial set up

#### **Enter your bank information in Profile**

Before using Concur Travel, enter your direct deposit bank information by clicking the **Profile** link at the top right of the **Concur** home page, followed by **Profile Settings>Bank Information** (left side of profile page). Travel recommends that you reference your bank information in AXESS if you will be using the same account for travel reimbursements.

N.B. You could opt to receive reimbursement by check, but this will take much longer, up to a couple of weeks longer.

#### **Assign your delegate(s) in Profile**

If you assign Chris MacIntosh as your delegate, she will be able to look at and help submit your travel requests and expenses (though not your banking information, of course). Note that the one thing that cannot be delegated is the final verify and submit of an expense report.

Click on **Profile>Profile Settings>Request Delegates**. You may grant one or more of the following permissions to your delegate(s) - prepare, view, receive emails, preview or receive approval emails.

#### **Enter your default Project Activity in Profile**

If you use the same P-A account for all your travel, you can set this up in your profile by clicking on **Profile>Profile Settings>Expense Information**. Click and select the corresponding Project, Activity, WBS and Fund. This optional step enables the pre-population of the related fields as you complete future travel requests. It may be helpful if you travel using the same project activity most of the time. You may still override your default project activity in the forms whenever necessary without changing your profile information. Do not enter this information if you frequently charge to different projects.

If you need to know your SLAC Project-Activity (P-A) code, Chris or any of the SIMES admins can help.

### Training and Help

On the SLAC Travel page, there are links to some very useful "Quick Start Guides". Choose the Concur tab along top of page, then select Quick Start Guides from left side.

#### **Reimbursements**

Airfare: you may request reimbursement for airfare after your travel request has been approved and after purchasing your ticket, but before you complete the trip. All other expenses will be reimbursed after the trip. See page 8 of Travel and Reimbursement Policy/Procedure.

#### **Travel Allowance Itinerary**

When filling out the expense report, a pop up asks if you are claiming lodging and/or meals. If you click yes, you next are presented with a 'Travel Allowance Itinerary' to fill in.

- Enter the city/town you leave from (e.g. Stanford, or the city you live in), not the airport.

- Enter your destination, which may or may be the same town as the airport you fly to.  
Example: Leave from Palo Alto. Arrive Brookhaven (not New York City)
- Click "Save". Do not click "Next" as that bypasses the ability to enter your return segment.
- After you click "Save" you should see a screen to enter your return details. Or the next leg of your trip if you are spending time in multiple places.
- When all your travel segments are entered, then click "Next".

Receipts are needed for any expense over \$70.

For expenses under \$70, it's helpful to attach the receipt if you have it.

If your total expense exceed 125% of the estimated expenses on your travel request, you will probably be asked to go back and edit/resubmit the travel request.

### **Overnight Travel within 50 miles of SLAC**

E.g. to LBNL requiring overnight stay, e.g. for beamtime.

See [this page](#) on SIMES website (Intranet tab, then travel page).