VPF Travel Expense Overview

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Policy Overview

Receipts

✧ Travelers must keep (and attach to their Concur Expense Report) itemized receipts for all expenses in excess of $75.
  
  ✧ The exceptions to this rule are Business Meetings and Meals with alcohol. Itemized receipts are required for these two types of Expenses regardless of price.
  
  ✧ A Meal becomes a Business Meeting when any non MIT party is in attendance.
  
  ✧ Original receipts associated with your trip and Concur Expense Report must be kept on file for the current Fiscal Year plus one additional year.
General Information:

- The MIT Travel Card is provided as a payment tool for the MIT community to use when making travel arrangements and while traveling on official MIT business.
- Personal items may not be purchased on the MIT Travel Card.
- The MIT Travel Card is for business travel expenses. It does not replace other MIT purchasing tools, such as the MIT Procurement Card (ProCard).
- Use of the MIT Travel Card does not eliminate the need for receipts. Please retain receipts for MIT Travel Card purchases in accordance with Travel’s receipt retention policy.
MIT Travel Card

How it Works:

✧ Operates like a standard Visa card where the vendor is paid at point of purchase.

✧ Card transactions are fed into Concur via a nightly feed. The transactions for purchases made on your Individual MIT Travel Card will feed directly into your profile under the Available Card Charges section [My Concur tab].

✧ MIT Travel pays the statement balance of all Travel Cards at the Institute at the beginning of each month. The transactions then sit in a suspense account managed by Travel staff until a Concur Expense Report is done.

✧ A Concur Expense Report, done at the conclusion of a trip, functions to transfer the related card charges out of the Travel Office’s suspense account and post them to your Department’s cost objects.
Submitting an Expense Report

Guidelines to Remember:

✧ Travelers are required to submit an expense within 30 days after the trip end date.
✧ Creating an Expense Report as your Travel Card charges start to feed into Concur and submitting the report in a timely manner will help you avoid receiving a dunning notice and facilitate the timely reimbursement of out of pocket expenses.
How to Create an Expense Report:

1. Access Concur: [https://web.mit.edu/concur](https://web.mit.edu/concur)
2. In the Expense Reports section of the My Concur page, click **New Expense Report**

3. Complete all required fields in the **Report Header** (those with the red bar at the left edge of the field)

4. Click **Next**
Submitting an Expense Report

How to Import Card Charges:
1. On the Expense Report page, click on the **Import** button

2. In the Corporate Card Charges section, select each transaction that you want to assign to the current expense report

3. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**
Submitting an Expense Report

How to Add an Out of Pocket Expense:

1. Click the New Expense button

2. On the New Expense tab, select the appropriate expense type
Submitting an Expense Report

How to Add an Out of Pocket Expense (cont):
3. For date fields, use the calendar to select the date of the expense
4. For lists, select from the list
5. For auto-complete fields, type the first portion of your choice and then select from the list
6. Complete other text fields and checkboxes as usual
7. Required fields will have a red bar at the left edge of the field. Once these are completed click **Save**
Submitting an Expense Report

How to Attach Receipt Images:

1. On the Expense Report page, from the Receipts dropdown menu, select Attach Receipt Images

2. On the New Expense tab, select the appropriate expense type
3. Click Browse, and then locate the file you want to attach
4. Click the file, and then click Open (to attach another image repeat above process)
5. Click Upload, and then click Done
6. To view the receipts, from the Receipts dropdown menu, select Check Receipts
Submitting an Expense Report

How to Add an Additional Approver:

1. Click on the Details dropdown and select Approval Flow

2. Click on first button with a downward facing arrow [Add a step after this step]

3. The added form field will be labeled User-Added Approver, type in the added approver’s Kerberos name, email, or last name to search
Submitting an Expense Report

How to Add an Additional Approver (continued):

4. Once you have located your additional approver click **Save Workflow**

   ✷ Once you submit your report it will now go to the User-Added Approver before the default cost object approvers

   ✷ Both Approvers must review and approver the report before it can be moved to Travel for final audit and payment processing
Concur’s Mobile App

How to Register:

1. Click on the Profile tab of the MIT Concur homepage and select Mobile Registration

![Concur's Mobile App](image)

2. Select the create a mobile PIN link to set up login credential for your mobile phone

   Set up PIN for mobile

   To log in to Concur on your mobile device or Concur Connect application, you must enter your User Name and a PIN.
   Enter a new PIN in the fields below to setup a new one.

   **Create PIN:**
   **Retype PIN:**

   PIN may be letters, numbers and special characters such as !,$,%.
   or # but no spaces

3. Download the Concur Mobile App via the App Store on your phone or utilizing the Concur Mobile Registration page to send a link to your device via email address or mobile phone number
Concur’s Mobile App

How to Register (continued):

4. When you first open the application on your mobile device you will see the following screen:

5. Your **Concur User Name** is your MIT email address (kerberos name plus @mit.edu)

6. Enter the PIN you created on the Concur **Mobile Registration** page within your profile and click **Sign in to Concur** button
Concur’s Mobile App

Using the App:

 List of Expenses (the Expenses Screen)

Select Expenses on the home screen to access the Expenses screen.

On the Expenses screen, you can:

 Add, view, edit, and delete Quick Expenses
 View and make minimal edits to card charges, which appear with a card icon.
 Attach expenses - both Quick Expenses and card charges - to an expense report.
Concur’s Mobile App

✧ List of Reports (the Active Reports Screen)

Select Reports on the home screen to access the Active Reports screen.

On the Active Reports screen, reports are grouped by: Unsubmitted Reports, Submitted Reports, and Other Reports.

On the Active Reports screen, you can:

✧ Review the report status
✧ Delete a report
✧ Create a new report
✧ Access current reports to view, edit, delete or submit
Concur’s Mobile App

✧ Create a Quick Expense

Use the + on the top of the Expenses screen or Use Quick Expense on the home screen (steps outlined below)

1. Select Quick Expense.
2. Enter the required information and attach the receipt image
3. Select Save.

✧ Delete an Expense from the Expenses Screen

1. Select Edit.
2. The expenses can now be selected using the ○ to the left of each expense.
3. Select the desired expenses.
4. Select Delete.
Concur’s Mobile App

✧ **Attach Expenses (from the Expenses Screen) to a Report**

You can attach expenses to an unsubmitted expense report or to a new expense report.

1. Select **Add to Report**
2. The expenses can now be selected using the radial button to the left of each expense. Select the desired expenses
3. Select **Add to Report**
4. To create a new report, select + at the top of the screen - or -
5. Select from existing reports
Concur’s Mobile App

♫ Work with Receipts

To attach receipts to expenses that require them:

1. Open the expense, and then select Receipt.
2. Select Attach Receipt.
3. Take a picture using the phone's camera, or select from the phone's Photo Album.
Concur Help/Resources

Link for Concur Travel & Expense:
- https://web.mit.edu/concur

Training Documents:
- http://vpf.mit.edu/site/travel/resources

Drop In Sessions (for assistance with current expense reports):
- Every Wednesday from 10:00 – 11:00am in NE49 (3rd Fl, Little Cayman Lab)
Travel

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For Staff Information and Telephone Numbers Please See Our Web Page : http://vpf.mit.edu/travel