

# ROLES AND RESPONSIBILITIES IN CONCUR

## OVERVIEW ROLES IN CONCUR

This document provides a general description of the roles and responsibilities in Concur. These are standards where there may be a need for additional review/responsibility depending on the situation. In addition, submissions, reviews and approvals need to be performed in a timely manner as outlined in the Travel and Entertainment Policies and Procedures. For any questions or concerns, please use the contact information at the bottom of this document.

### KEY TERMS

<b>AP</b>	Accounts Payable
<b>FO</b>	Fiscal Officer
<b>PI</b>	Principal Investigator
<b>SPS</b>	Sponsored Program Services
<b>OVPR</b>	Office of Vice President for Research
<b>TRAVEL SEGMENT</b>	Airfare, Car rental, or Hotel
<b>CONCUR EXPENSE REPORT</b>	Refers to Concur Expense Reports (Travel, Non-travel, Student, Guest, and Athletic Policies).

### TIMELINE FOR APPROVAL – EXPENSE REPORTS ONLY

<b>SUPERVISOR/FO/PI/SPS</b>	21 Days
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Role	Description
<b>Traveler/Report Preparer or their delegate</b>	<p><b>Pre-Trip - Travel Request</b></p> <ul style="list-style-type: none"> <li>• Pre-approval - If a segment (airfare or hotel) is involved, then get an approved request before the trip occurs. This also applies if an employee pays for a guest or UConn student's segments. Employees and UConn student(s) need to have the request approved in Concur. For guests either an outside approval or Concur Request would suffice.</li> <li>• Policy exceptions - For transactions that may be considered out of policy please select "Request for exception to Policy" on the request form and provide the exception and the business justification or cost savings. If you are unsure, please reach out to Travel Services for guidance before the trip.</li> </ul> <p><b>Post Trip – Submit a Concur Expense Report per trip –</b></p> <ul style="list-style-type: none"> <li>• The employee, or their delegate acting in their role, must attach detailed receipts, where applicable, assign the correct expense type to the provided receipt, and ensure the full receipt amount agrees with the amount entered on the Concur Expense Report.</li> <li>• Provide an explanation in the report header or expense type comment section for any items that would at first appear to be out of policy.</li> <li>• Break out any "personal/non-reimbursable" expenses that are not a UConn business purpose or is out of policy.</li> <li>• Submit Expense Report within 30 days of business trip.</li> </ul>

<b>Fiscal Officer</b>	<p><b>Pre-Trip - Travel Request Approval</b></p> <ul style="list-style-type: none"> <li>• Ensure funds are available to cover trip/expense in full.</li> <li>• Verify the KFS account number and expense type being used is accurate</li> </ul> <p><b>Post Trip – Concur Expense Report Approval</b></p> <ul style="list-style-type: none"> <li>• Ensure funds are available to cover trip/expense in full</li> <li>• Verify the KFS account number and expense type being used is accurate</li> </ul>
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<b>Direct Supervisor (if applicable)</b>	<p><b>Role of Supervisor</b></p> <p>The supervisor is in the best position to have sufficient knowledge of, and authority over, their direct reports to ensure reasonableness of travel plans and ability to question and deny unallowable expenses, where necessary. For this reason, downward delegation is not permitted and if delegating upwards or to a peer this person must be an Authorized Approver defined in the <a href="#">Policy on Approval Authority for Financial Transactions</a>.</p> <p><b>Supervisor's approvals:</b></p>
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- Concur requests for trips involving a segment before the trip begins
- Concur expense reports for trips with no travel segments
- Exceptions where the amount of the Concur expense report is more than 20% and \$1,000 from the Concur Request

**Pre and Post Trip - Summary for All Concur Request Forms and Expense Reports -**

Supervisors provide a general overview to ensure the trip:

- Is necessary
- Has a valid business purpose
- The location and amount of time are reasonable
- Unusual requests or transactions are explained to ensure expenses have a valid business purpose. Example - Conference was 3 days but Traveler has 7 days as business travel
- Long-term travel – over 30 days
  - Business purpose to include a description that will allow a non-specialist to understand the nature of the travel taking place. A brief 2-3 sentence summary should be able to provide enough information for someone to understand the travel.
  - Generic terms such as “sabbatical leave,” “research leave,” or “fieldwork” do not adequately describe long-term travel. Instead, the nature of the work to be completed on the sabbatical or research/professional leave, the type of fieldwork research, and some brief explanation of why the travel location is necessary should be provided. Examples might include:
    - Collaborative research, explaining why collaboration is needed at that location.
    - A residential period (including fellowships) at another institution or lab for the purpose of conducting research.
    - Fieldwork research that must be conducted in a specific location. The description should include the fact that this is field or site-specific research.

**PI/SPS**

The approver acting in this role will review the Expense report transaction details for compliance against the research grant and KFS account being charged.

**Travel Services in Procurement**

Assist with front end training of Concur and monitor and respond to the central support email and phone line to provide guidance and clarification to the University community regarding policy and procedures and the submission of travel requests and expense reports in Concur.

**Anthony Travel**

University’s Travel Management Company (TMC) that assists travelers in booking travel.

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<b>AP Expense Report Processor</b>	Accounts Payable will manually review only Expense Reports that have potential travel policy violations and will then confirm compliance based on the Travel and Entertainment Policy for the specific potential violation.
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**ADDITIONAL SUPPORT**

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For help with Concur Expense Reports, contact [travel@uconn.edu](mailto:travel@uconn.edu)

For additional reference material, refer to <https://travel.uconn.edu/training-and-resources/>