

Reconciling Professional Development and Professional Travel in Concur  
Salary and Fringe Benefit Agreement Addendum 4/22/16

Effective immediately, faculty have several options for recording and reconciling their professional development and/or professional travel using the Concur system.

- Current Approach:
  - Create an expense report.
  - Create a unique record for each relevant expense making sure to use the correct concur category for each expense.
  - Faculty can manually enter each expense (and accompanying receipt) or allow the system to prepopulate expense categories through use of a p-card.
  - Concur totals expenses, determines a reimbursement amount, and prepares the report for approval.
  - Faculty then submit their expense report using the specific approach approved by their respective school or college.
- Quick Entry Approach:
  - Create an expense report.
  - Sum all expenses using the faculty professional development template (<http://www.webster.edu/finance-and-administration/accounts-payable/forms.html>). Print for upload with receipts.
  - Gather all relevant receipts and the completed professional development template to create one .pdf file (expense portfolio).
  - Upload the expense portfolio using the Faculty Professional Development expense type in the “Other” category (see below).
    - Note: More than one line item will need to be created if multiple currencies are used.
  - Faculty then submit their expense report using the specific approach approved by their respective school or college.
- Hybrid Approach;
  - Create and expense report and combine the two approaches listed above.
  - For example, faculty could use a p-card for some expenses for a conference and submit additional receipts using the quick entry approach.

All Expense Types

<b>1) Travel</b>	<b>...2) Meals &amp; Entertainment</b>
Airfare	Individual Meal
Car Mileage Reimbursement	Meals & Entertainment (<10 Attendees)
Car Rental	<b>3) Other</b>
Cash Tips	All Other Expenses
Conference Fees	Disputed Charges
Hotel	Faculty Professional Development 
Hotel (Conference & Group Rates)	Gifts, Prizes and Awards (<\$100 per recipient)
Taxi or Train	Gifts, Prizes and Awards (>=\$100 per recipient)
Tolls	International Service Fee
Travel Agent Fee	Relocation
Travel Incidentals	Student Organizations
<b>2) Meals &amp; Entertainment</b>	
Events & Group Entertainment (10+ Attendees)	