Professional Development

I (can) Concur!
Basics for Travel and Funding Requests

March 17, 2023
Agenda

1. Overview for approval of funding from Professional Development Committee
2. Submit Request in Concur
3. Submit Expense Report in Concur upon return from conference
4. Any Other Employee Reimbursement (Non-Conference related)
5. Assign someone as a delegate
Approval of funding – Key Notes

- [https://www.evc.edu/support-resources/participatory-governance/professional-development](https://www.evc.edu/support-resources/participatory-governance/professional-development)

- Committee accepts funding request for virtual or off-campus professional conferences, seminars, or workshops.

- Estimate the expected cost such as registration, lodging, airfare, mileage etc.

- Funding for full-time faculty is limited to a maximum of $1,200.00 per academic year.

- Adjunct faculty: $600.00 per academic year.

- Full-time classified staff: $1,200.00 per academic year.

- Part-time classified Staff: $600.00 per academic year.
My Conference Qualifies! What’s Next?

- Submit Request through Professional Development Funds form
- Request is discussed at Professional Development Committee monthly Meeting
- You got a letter! Open it!
- Submit Request in Concur
Submit Request in Concur
(Step by Step Instructions)

1. Login through sso.sjeccd.edu
Submit Request in Concur cont.

2. Click “Requests” on black menu
   - If you don’t see “Requests” contact Business Services
3. Click “Create New Request”
Submit Request in Concur cont.

4. Fill out all required fields in the Header screen
   - Give a meaningful **name**
   - **Justification** of Travel
   - **Trip Type** (In State, International, Non-Travel, Out of State)
   - Start Travel Date
   - End Travel Date
     - Note: The date you start and end the travel, not the actual conference dates as per agenda
   - **Main Destination City and County**
   - Select the appropriate fields “**How you book your travel?**”
     - Agency-booked (**Do Not Use**)
     - Self-Booked outside of Concur Travel (You can book with or without Concur Travel)
     - No Travel (Online conference)
Submit Request in Concur cont.

- Select if you have Personal Travel (Yes/No). If yes, state the dates
- Check mark “Professional Development Request”
  - **Text**: means you have to know the fund name (E.g. General Funds)
  - **Code**: means you need to know the 2 digits of the fund (E.g. 10)
  - **Either**: Most preferred
Submit Request in Concur cont.

5. Your request header has been created, and now add all major estimated expense: e.g.
   a) Registration cost
   b) Lodging Cost
   c) Air Fare
   ❖ Click “Add” and select “Expected Expense type” one at a time.
Submit Request in Concur cont.

6. Click “Attachment” to attach needed documents:
   a) Professional Development **Funding Approval Letter**
   b) PDF of **Conference details** (flyer, conference agenda, etc.)

7. To **edit/delete/allocate**: check mark the line & complete as needed.
Submit Request in Concur cont.

8. Click “Submit Request” after validating.
   - The request goes to the next approver “Direct Manager” as per workflow.

9. Concur will notify you as soon as the request gets approved.

10. You are ready to book your trip.
Submit Expense Report in Concur
(After return from Conference)

Goal is to show the entire cost of that conference/trip, irrespective how it was paid.

1. On the black menu bar, click “Requests”
   - Double click your approved request
Submit Expense Report in Concur cont.

2. Click on “Create Expense Report”
Submit Expense Report in Concur cont.

3. Click "Add Expense". Be sure not to exceed PD approved amount.
   - You going to add all **actual expenses** such as registration, air fare, lodging, mileage, per diems one at a time.
   - Ensure to attached itemized invoice/receipt with proof of payment (last 4 digit of credit card #)
   - Payment types are either:
     - Out of Pocket – (Reimbursed to Employee)
     - Prepaid by P-Card
     - Paid with District Check (RFC)
   - Upload receipt and save expense.
Submit Expense Report in Concur cont.

Key Notes for all reimbursement:

- Total mileage can be claimed 300 miles one way, and 600 miles round trip. No receipt is required.
  - If the travel is completed between Monday to Friday, round trip mileage can be calculated from EVC to the designated destination.
  - If the travel is done on weekend, round trip mileage can be calculated from your home to the designated destination.
- Keep gratuity 20% maximum of the service.
- To claim Per diem, provide agenda only, no receipt is required.
Other Employee Reimbursement

Any college related expenses that is paid by an employee such as:

- Purchase of minor office supplies (54300)
- Ground/Public Transportation “Parking” (55200)
- Mileage (55230)
- Postage (55810)
- Memberships (55220)
- Food and Beverage (Need approved Food Purchase Request form signed by President) (54301)

- Make sure the budgets are available on the account
Other Employee Reimbursement cont.
(Step by Step Instructions)

The steps are:

1. Go to “Expense” on the black menu bar
2. Click “Create New Report”
3. Select “Non Travel Policy”
4. Fill all the field and click “Create Report”
5. Click “Add Expense”
6. Select the appropriate expense type.
   - Note: Ensure to have a **itemized receipt**.
   - If you cannot provide receipt, provide signed “Affidavit of Missing Receipt” form is available at: [https://www.sjeccd.edu/district-services/fiscal-services/accounting-toolbox](https://www.sjeccd.edu/district-services/fiscal-services/accounting-toolbox)
Other Employee Reimbursement cont.

7. Add Mileage expense line
   - Click "Add"
   - Select "Local Car Mileage"

8. Enter: Following
   - **Transaction date** (Date of travel)
   - Select Trip Type: **In state**
   - Click: **Mileage Calculator**
Other Employee Reimbursement cont.

- Enter: “To” and “From” address
- Select “Round trip”
- Click “Add Mileage to Expense”
- Add “comments” (Purpose of the trip)
- Click “Save Expense”
- Note: a map will be automatically saved to your request.
Other Employee Reimbursement cont.

9. Review and Click “Submit Report”
10. An email will be sent to the next approver
Assign Someone as a Delegate
(Step by Step Instructions)

A **delegate** is a user who has been granted permission to act on behalf of another user to perform tasks such as preparing and reviewing the expense reports.

**Steps:**

1. Click “**Profile**” on Concur homepage
2. Click “**Profile Settings**”
Assign Someone as a Delegate cont.

3. Click “Expense Delegates”
Assign Someone as a Delegate cont.

4. Click “Add” on the delegates tab
5. Search by name or email address
Assign Someone as a Delegate cont.

6. Check mark the appropriate boxes only
7. Click “Save”