

Additional Concur job aid for BCMP users

more resources at: <http://travel.harvard.edu/concur>

Profile set up guides can be found at the link above, but the most important steps are to:

- Verify Email Address and add banking information.
- Select Expense Delegates – this section is for faculty only - you can select more than one delegate who can prepare expense reports on your behalf. For your convenience, HU AP will autofill this field with Lola Yao and Kristen Parker as your default delegates, as well as your assistant whenever applicable (we've provided a master spreadsheet to AP). You can always edit your delegate selection at your convenience. When and if a delegate creates a report for you, you must still review and submit your report via your computer or the Concur mobile app.
- Select Default Expense Approver – for all users, please enter KyungAh Benedetti (kyungah_benedetti@hms.harvard.edu).
- (Optional but highly recommended) Download the free CONCUR app to your smartphone & link it to your account. With this app, you can take pictures of receipts and upload directly onto CONCUR.

Components of a Business Purpose

Business Purpose in Concur

- Concur only allows 64 characters in the Business Purpose field; abbreviations may be necessary.
- You must include the dates of the expense and a short description of the reason for the expense (why) for the expense.
- Business Purpose must make it clear what project or funding source should be charged.
- Business Purpose can be edited for each individual charge in the report as necessary.
- For conferences/travel, include the name of the conference and the reason for attending.
- If who, what, when, and where are not clearly noted in other fields, such information and any additional explanations can be entered in the Comments field which holds 250 characters.

Examples

Concur Business Purpose (BP): AACR Conference April 1-5, 2017 to present R01 work

Comment Field: I attended the American Association for Cancer Research Annual Meeting. Here I presented results of the work we have done on [*insert description of work you are presenting*]. This research is related to our cancer R01 project. See the attached agenda for the meeting in Washington DC. <http://www.aacr.org/Meetings/Pages/MeetingDetail.aspx?EventItemID=105&DetailItemID=540#.WMmaSk0zWUk>.

Concur BP: UCSF Conf. June 10th-14th; present P01 work and run workshop

Comment Field: UCSF Conference June 10th-14th, San Francisco. I attended this conference to present our work on our project component of Lymphoma PPG. This was an annual meeting for the PPG investigators to share and discuss project results, and to confirm targeted milestones for the next budget period.

Concur BP: JCC Fellows Symposia. April 10 -14, fellowship presentation

Comment Field: Jane Coffin Childs Annual Fellows Symposia April 10th-14th, Connecticut. I attended this symposia and presented a poster for 2 days on [*insert short description of poster*], as required by my fellowship award from JCC. Please charge to my JCC fellowship.

Under Expense Settings

- Expense information – please use lab PI's tenure fund or a UD account as your default expense account. You will be able to use sponsored funds when you incur expenses related to sponsored projects. Please consult your grant manager regarding your lab PI's tenure or UD fund, and their correct accounting string. For faculty, we've auto-filled this section with your tenure fund or startup fund. If you wish to change your default expense account, you can always edit it under this setting.

- When creating a new Expense Report – you will be directed to a screen where you can enter report header, business purpose, comments, and costing info. Initially, the system will automatically show your default expense information. If you are unsure of costing info for a specific project that should support your reimbursement, please obtain the costing info from your grant manager or leave your default costing info as is. Your grant manager will ensure correct account string is entered prior to approval.

Expense Preferences

- All email prompts that are listed under this section are optional as users will receive any system-required, non-optional notifications from Concur. We recommend that you deselect all email prompts under Expense Preferences section.

Other Notes and Issues

- Please note that this process is for EMPLOYEE reimbursements only.** For those who are considered non-Harvard employees (HHMI employees, fellows who are supported by external fellowship grants, students, etc), their reimbursements will continue to be processed via Accounts Payable.
- Sales Tax** does not need to be itemized for meals unless there is alcohol. For ANY other expense type, itemize the sales tax amount as '8450 Other'.
- Comments** should only be used to give your approver the information they need to approve your reimbursement. For any back and forth discussions about expense types or allowability, please use e-mail or phone.
- Other Attachments** - Email approvals, full business purposes, etc. that are related to the entire trip/report can be attached to the first expense item.

- **Missing Receipts** - If the charge is under \$75 and you don't have a receipt, you will need to fill out a paper Missing Receipt Affidavit form and upload as the receipt (<http://oc.finance.harvard.edu/links/missing-receipt-affidavit>). If it is over \$75, the MRA can be completed within Concur; the option is under the "Receipts" drop down.
- **City of Purchase** – use what's actually on the receipt. This field determines whether a currency conversion may be needed or not.

| Common Expense Types | Notes |
|----------------------|--|
| Business Meals | <p>Notes: Provide itemized receipts. Please list the attendees in the comment section or list them directly on the receipt. If alcohol is included on the bill, those items along with applicable tax and tip must be itemized as alcohol using object code 8450. Please note that itemized receipts are <u>required</u> for charging sponsored projects. If you only have a credit card slip, use a Missing Receipt Affidavit (MRA) even if the total amount of the bill is less than \$75. Alcohol should <u>never</u> be charged to a sponsored grant. If alcohol was included and the traveler cannot attest to the alcohol cost, then <u>no</u> portion of the meals costs can be charged to a sponsored project.</p> <p>Commonly used for: Lab lunches, hosting postdoc candidates, meals during meetings, any meal that includes someone other than yourself.</p> |
| Individual Meals | <p>Notes: Provide itemized receipts. See above in regards to charging sponsored funds.</p> <p>Commonly used for: Meals for yourself while traveling.</p> |
| 8450 Other | <p>Notes: If used for business meals, make sure to include a list of attendees in the comment section or list them directly on the receipt.</p> <p>Commonly used for: Meals with non-itemized receipts, Sales tax for non-meal expenses.</p> |
| Food Supplies | <p>Commonly used for: groceries, supplies or other kitchen items purchased for an event or meeting.</p> |
| Conference Fees | <p>Notes: Make sure to include the conference name and dates in your business purpose, along with the reason for attending.</p> |
| Airfare | <p>Notes: Federal regulations require travelers to select and charge the lowest possible airfare to federal awards. Also for international flights, please make sure to follow the rules of the Fly America Act if you are charging your federal grant. Visit the following link for additional information on Fly America Act and Open Skies Agreement http://travel.harvard.edu/international-travel.</p> |
| Ground Transport | <p>Commonly used for: Taxi cabs, Uber, rental cars, public transportation</p> |
| Personal Car Mileage | <p>Notes: The system has a built-in mileage calculator that will map the route and do the math for you based on the current IRS reimbursement rate.</p> |
| Lodging | <p>Notes: You will be required to itemize for the nightly rates and fees. The system will walk you through the process. You can also include and further itemize charges such as daily parking and wi-fi expenses, meals and other allowable incidentals that were included on your hotel bill.</p> |
| Telecommunications | <p>Notes: Use to cover hotel wi-fi. If it is included on your hotel bill, start by entering the full invoice as Lodging expense and itemize the bill from there.</p> |