Concur Approval Process

Travel Request Approval:

Travel Requests are found under the Approval section in Concur (see screen shot below). Requests must be reviewed for purpose, comments, travel dates, amounts, and chartfield information. It is the department's responsibility to determine whether there are funds available to pay for the request and to monitor the expenditure of department travel funds. Approved travel requests do not appear on the GL until payment has been made following approval of the expense report. Requests must be tracked and subtracted from available travel funds in order to maintain accurate department financial records.

When a travel expense is eventually submitted, the travel request should be attached to the expense report in Concur. The department should review the expense report to make sure that the actual expenses align with the approved request.

Travel Expense Approval:

1. Log in to Concur & Go to Approvals
2. Review the Expense Report

3. Look for the following items:
   - Copies of paper receipts (click on the third tab that says Receipt Image).
   - Copies of Tcard transaction receipts (click on the small icon at left that looks like a credit card with a stripe in the middle)
   - Hotel, group meals, airfare and transportation transactions (other than tolls) must have both receipts attached.
   - If the required receipts are not attached, do not approve. Return to traveler to complete/correct with notes in the comment section stating the reason for the return.
   - If the dates on the receipts do not fall within the period of the approved travel, do not approve even if the total amount is within the budget.

4. Verify that no tax was charged for in state travel items and that alcohol purchases are not being charged.
If tax was charged for Maine travel items, or alcohol charges appear, return to traveler to correct and do not approve.

5. Check the Allocation to ensure accuracy

   o To find the chartfield, click on Details, then Report Header. If the chartfield is not correct, do not approve. Return to traveler for correction or contact the Dean's Office for assistance with chartfield allocations.

The Dean's Office at 581-2026 or the Procurement Service Team at 581-9101 can help with specific questions and can provide additional training.

For more information about Concur, including recorded training webinars and videos, visit https://mycampus.maine.edu/group/mycampus/travel.