


Concur is UNC's travel management software program and should be used by UNC employees for:

- **Pre-travel approval** for overnight trips and car rentals
- **Travel booking**, including airfare, lodging, and rental cars
- **Expense reimbursements for out-of-pocket expenses** associated with travel
- **Reconciling purchases made on a T&E card**

## LOGIN TO CONCUR VIA CONNECT CAROLINA

1. Visit [ConnectCarolina.unc.edu](https://connectcarolina.unc.edu)
2. Login with your Onyen
3. Select **Self Service** in the top left
4. Find Concur under **Useful Links**

## GENERAL CONCUR TIPS

- **Naming Convention:** All requests and expense reports in Concur should use the following format: **[Last Name], [First Initial] [Travel Date] [Purpose and/or Destination]**
- **Chartfield Strings:** You do not need to provide complete chartfield string information in Concur. Instead, please **share as much information as possible in the Additional Information box** report to help us know the purpose of the trip and whether there is any external funding being used to support the travel.
- **Walkme Virtual Assistant:** This tool can help you with travel requests and expense reports, walking you step-by-step through common tasks in Concur. Access help anywhere you see this  WalkMe icon.
- **Errors & Alerts:** Concur has built-in features to alert you to tasks that need to be completed or when help is available. The most common alerts are:



**Exception:** Indicates errors that must be resolved before you can submit. In most cases, the SOG Business Office can help you make corrections in just a few minutes or make corrections on your behalf. *(Common exceptions include missing required fields, missing receipts and missing itemizations)*



**Alert/Warning:** A warning that is informational only; you can still submit even with these present, but make sure to double check the flagged information for accuracy. *(Common warnings include verifying addresses for personal mileage and notification for charges outside of trip dates)*



**Information:** An alert that is informational only; you can still submit even with these present.



**Quick Help:** Help is available through the WalkMe tool.

## APPROVAL TIMELINES

- **Pre-approval is required for any travel involving an overnight trip.** These approvals are managed by the SOG Business Office and are usually granted in 2-3 business days. Reach out to us if your trip needs urgent approval. Request approval is required before booking any airfare, transportation or accommodations.
- **Post-trip expense reports should be submitted within 30 days of travel.** They are first approved by the SOG and are then submitted to the UNC Travel office for review and approval. Final approval from the UNC Travel office may take 4 to 6 weeks.

## PRE-TRAVEL APPROVAL

- Submit a travel request in Concur for all overnight travel **at least 30 days ahead of time.**
- A travel request is also required for **same-day car rentals.**
- A travel request is **not required for day trips** (mileage and/or parking reimbursement only).
- A travel request is **not required for non-travel-related** expenses like business meals and memberships.

## BOOKING TRAVEL



### SUPPORT WITH PLANNING & BOOKING | WorldTravel

WorldTravel, the University's authorized travel agent, can assist with booking airfare, lodging, and rental vehicles. **We strongly encourage you to utilize this resource for trip planning.** Reach them via email at [uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com) or by phone at 877-602-4950.



### GROUND TRAVEL | Vehicles

- Use a state-owned vehicle when possible. Request a state-owned vehicle by contacting SOG Facilities ([facilities@sog.unc.edu](mailto:facilities@sog.unc.edu)). If a vehicle is not available, use the least expensive alternative method of transportation available.
- Rental vehicles should be reserved through Enterprise:
  - Online via Concur
  - Through World Travel
  - Book directly at Enterprise using the code **NC53E02**
  - Charge the expense to your T&E Card
  - Save your gas and parking receipts for reconciliation
  - We strongly encourage booking a rental vehicle for trips over 350 miles
- If a personal vehicle is used, mileage will be reimbursed via UNC's established mileage reimbursement rate. See more information in the "Mileage Reimbursement Rates & Limits" section below.



### REGISTRATION | Conferences and Continued Learning

- Charge to T&E Card or departmental P-Card.
- Optional activities not included in conference registration are NOT reimbursable.
- Save the agenda in case asked to provide this documentation to the Travel Office.



### LODGING | Hotels

- Overnight lodging may only be booked if location is +35 miles from traveler's home. Lodging expenses are capped at 150% of the established GSA lodging rate for the area and your travel dates.
- You are strongly encouraged to book through Concur, unless a negotiated discount rate is available outside of Concur. Using Concur will ensure you remain within the established lodging threshold.
- World Travel can also assist with booking hotels.
- Save itemized receipt "Folio" and submit when trip is completed. **Even if lodging is sponsored by another organization, you should still include a \$0 lodging expense** in your Travel Request along with a brief explanation (for example, the conference organizer paid for the room on your behalf).



### LODGING | Third Party Vendors (e.g., Airbnb, VRBO)

- Non-hotel lodging requires pre-travel authorization. Check with the SOG Business Office for required forms. Once approved, you are responsible for booking accommodation and signing the lease.



### AIRFARE | Flights

- **All flights should be booked through Concur** or using WorldTravel, Inc. *Limited exceptions exist* when flights purchased outside these methods demonstrate real cost savings. Please work with the SOG Business Office **before purchasing** if you wish to book flights outside of Concur or WorldTravel.

## REIMBURSEMENT OF OUT-OF-POCKET EXPENSES

All travel expenses should be paid with a T&E card, if available.

- If booking or other expenses must be placed on a personal credit card, reimbursements will be processed through Concur.
- Keep itemized receipts and **submit your expense report within 30 days of completing trip.**
- **T&E Cards may only be used for travel *for the cardholder* or for business meals.** Expenses such as general supplies, services, or travel expenses for other individuals are not allowed. Group travel will only be permitted with prior authorization from the travel office.

### Reimbursements for Meals:

- The University reimburses meals using per diem rates set by the US GSA. Rates depend on the date and location of travel. Use the Travel Allowance Wizard to apply the Travel allowance in your expense report.
- **Do not purchase personal meals using a T&E card.**

### Reimbursement cutoff:

To comply with IRS rules, the University enforces a firm cutoff for how long employees can request reimbursement for travel.

- **Expenses must be submitted within 60 days** of the trip end date to be eligible for reimbursement and for the reimbursement to be non-taxable.
- Expenses submitted after 60 days will be reimbursed but may be taxable.
- Expenses submitted 180 days or more after the expense is incurred will not be reimbursed.

## MILEAGE REIMBURSEMENT RATES & LIMITS

When driving a personal vehicle for business purposes, mileage will be reimbursed as follows:

- **Mileage up to 350 miles** (round-trip) will be reimbursed at the full IRS rate (the rate is determined in Concur).
- **Mileage which exceeds 350 miles** (round-trip) will be reimbursed at the full IRS rate for the first 350 miles and reimbursed at 50 percent (50%) of the full IRS rate for all miles over 350.
- **Mileage which exceeds 750 miles** (round-trip) will require that the traveler provide a comparable round-trip, economy class airfare ticket quote from Concur or World Travel, Inc. obtained at least 21 days prior to the trip. Reach out to the SOG Business Office for help with this comparison.
- When entering mileage on a Travel Request in Concur, **travelers should enter their round-trip mileage as one expense.** This will allow the system to notify them of the reimbursement changes listed above.

## COMBINING UNIVERSITY BUSINESS TRAVEL WITH PERSONAL TRAVEL

If you would like to combine personal travel with a business trip, you may do so with prior approval. **There are special instructions when booking travel and submitting reimbursement requests in these cases.** Reach out to the Business Office for assistance when combining personal travel with business travel.