Travel and Expense Manual

for off-campus instructors in the Distance Education Unit
at the University of Saskatchewan

Notes to all instructors:

All off-campus expense claims should be submitted on a monthly basis to ensure that instructors do not carry the expenses from their personal finances for a significant period of time.

The University of Saskatchewan uses the Concur Travel and Expense management system for all University-related travel and expense online submission. You will access the Expense Reports in the Concur system through your PAWS account. Concur Travel and Expense claim assistance is available through ConnectionPoint.

This customized manual is a step-by-step guide created by the DEU to assist off-campus instructors in navigating the relevant features of the Concur system.

Paper-based expense claims forms are not permitted for any employee expenses; all off-campus instructors are University of Saskatchewan employees.

Hands-on, face-to-face training is available; visit: https://taurusnew.usask.ca/courses/registrationCourse.cfm?crsid=389

To book a rental car, contact Dean Evans (dean.evans@usask.ca); do not use Concur to book a rental.

Travel Requests are not required for travel WITHIN Saskatchewan.
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How to Access the Concur System

1. Log into paws.usask.ca with your NSID and password. All University of Saskatchewan employees are assigned a unique lifelong NSID and password (see https://servicecatalogue.usask.ca/it/advice-help-and-support.php for assistance).
2. Search PAWS for “Concur” using the search bar or go to https://paws.usask.ca/#concur.
3. Click on the Concur Travel and Expense channel link.
4. Click on the Go to My Concur button.
5. Dismiss the Concur Login Warning.
6. Complete STEP 1 and STEP 2 (below); you will only have to do this once.

STEP 1 – Create a Personal Profile

a. Click on the Profile button in the top right-hand corner of the Concur window, then click the Profile Settings link.

b. Select the Personal Information link from the list of Profile Options.

c. Review and save the appropriate information, including:
   - Company Information (pre-populated based on payroll data)
   - Work Address
   - Contact Information
   - Email Addresses
   - Emergency Contact
   - Travel Preferences (see image)
     - Gender
     - Date of Birth
   - All other fields in this section are not required

d. Disregard the following unrequired sections:
   - International Travel: Passports and Visas
   - Assistants and Travel Arrangers
   - Credit Cards
STEP 2 – Create Expense Settings

a. From the Profile Settings left-hand navigation menus, access the Expense Settings.

b. Click on the Expense Information link to ensure this information has been pre-populated based on payroll data.

c. Click on Expenses Delegates. A delegate is the individual authorized to process your expense claims, including minor corrections to dates, expense approvers, etc. If you do not set a delegate, all errors will be returned to you for correction.
   - Click Add
   - Search for and select Lyndon MacNeill lam920@mail.usask.ca
   - Check all of the appropriate boxes (see image) and Save

d. Click on Expense Approvers. A default approver is pre-populated based on payroll data. Instructors working in both on and off-campus positions may not have a DEU-based approver by default; these instructors must pay particular attention to expense submission.

e. Concur has a mobile app that allows you to take photos of your gasoline receipts, etc. For more information on how to use the app, go to Concur Mobile Registration in the Profile Options menu.
STEP 3 – Create an Expense Claim

Creating a New Expense

a. From the home screen, click on + New or the choose the Expense menu from the top navigation bar.

b. Click + Create New Claim and follow the pattern demonstrated below:
   - Report Name SOC 112 – Prince Albert
   - Report Date (today’s date by default)
   - Business Purpose/Description Teaching SOC 112 in PA on Mondays in September

<table>
<thead>
<tr>
<th>Chart</th>
<th>Fund</th>
<th>Organization</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>101089</td>
<td>1073</td>
<td>4000</td>
</tr>
</tbody>
</table>

- Will Tri-Agency funds...? No
- Comment (Use this field to provide additional information related to your claim, such as expectational circumstances like being storm-stayed. Irregular claims without explanation will be denied and returned to you for adjustment or to provide additional information before resubmission; this will delay payment of your expense claim.)

c. Click Next >> at the bottom of the screen.

d. In the Travel Allowances pop-up window, click Yes so that meal per diem allowances are available.

e. In the Travel Allowances For Claim window, click Go To Single Day Itineraries.
f. Enter the day of your travel in the **Choose start date** field, click **Go**, and then proceed to enter information into all of the required fields:

- **Start Location** (e.g. Saskatoon)
- **Depart** (the time you left)
- **End Location** (e.g. Prince Albert)
- **Arrive** (the time you arrived)
- **Depart** (the time you left to return home)
- **Back At** (the time you arrived at home)

Continue this process for additional instructional days during the month by returning to the **Choose start date** field. When you have entered all of your travel for the month, click **Save Itineraries**.
You will receive an *Itinerary has been created* message for all successfully created entries. When you have successfully entered all of your travel for the month, click *Next*.

![Itinerary has been created](image)

**g.** In the *Travel Allowances For Claim* window, you will now see a listing of all of your travel itineraries for the month included in your claim. Review your travel itineraries to ensure that all of the information is accurate. If you need to make any changes, highlight the relevant itinerary (displayed in blue) and click *Edit* to return to the previous step.

If all of the information is accurate, click *Next*.

![Travel Allowances For Claim](image)

**h.** In the *Travel Allowances For Claim* window, you will now be prompted to select the meal per diem allowances to include in your claim. Click the checkboxes to *exclude* meals that you are *not* including in your claim.
In the first example below, the claim is for a daytime class and only includes a lunchtime meal each trip. In the second example, the claim is for an evening class and only includes a suppertime meal.

When you have retained only the relevant allowable meals, click *Create Expenses* to add them to your claim.
Entering Personal Vehicle Mileage

a. If you have chosen to travel in your personal vehicle and claim mileage expenses, in the Manage Expenses window click + New Expense. The University of Saskatchewan has set the approved mileage reimbursement rate at $0.4535/km travelled in a personal vehicle. The mileage rate includes gasoline and all other vehicle expenses. (Instructions for renting a vehicle and claiming gasoline expenses can be found on page 11.)

b. In the New Expense tab, click Personal Mileage (71001).

Enter the date of your travel in the Transaction date field and click Mileage Calculator to use the preferred system generated values. Receipts are not required for mileage claims.

c. In the Mileage Calculator window, enter your respective departure and arrival cities into fields A and B, and then click Make Round Trip. Once you have successfully generated the mileage distance for your trip, click Add Mileage to Expense.
d. Click **Save** to add the mileage expense calculation to your travel claim.

e. To add mileage for additional trips during the month, repeat these steps beginning at **+ New Expense**.

f. You may choose to track your own mileage manually and enter the amounts into Concur rather than using the system generated amounts. Note that only reasonable claims will be paid and manually entered mileage will result in the warning message below.
Renting a Vehicle

a. Do not book rental vehicle through the Concur system. Rental arrangements should be made through Dean Evans in the Distance Education Unit general office by email at dean.evans@usask.ca or by telephone at 306.966.5563. For your convenience, you can book rental vehicles for the entire term at once. The University of Saskatchewan’s rental agreement includes a negotiated standard rate and rental fees are charged directly to corporate accounts.

b. If you have chosen to travel in a rental vehicle and claim gasoline expenses, in the Manage Expenses window, click + New Expense.

c. In the New Expense tab, click Gasoline (71001).

Enter the date of your travel, location, and receipt amount in the Transaction date, City, and Amount fields. You can combine all of your gasoline expenses into one amount or claim them all separately. Receipts are required for all gasoline expenses; click Attach Receipt.
d. In the **Attach Receipt** window, use the **Browse** and **Attach** buttons to upload a scan or picture of your receipt to your claim. If you have combined all of your gasoline expenses into one amount, include all of the receipts in one attachment.

e. To additional gasoline expenses during the month, repeat these steps beginning at **+ New Expense**.
Submitting Your Expense Claim

a. Once you have entered all of your expense claim information for the month and reviewed it for accuracy, you are ready to submit the claim. From the Manage Expenses window, click Submit Claim.

b. If you receive the Claim Submit Status error message below, you must return to your claim and address any errors marked with a red exclamation point. If you need assistance with your claim, please contact ConnectionPoint.

c. If there are no errors, you will receive the following Final Review pop-up window. Click Accept & Submit.

d. In the Approval Flow for Claim window, you must correct the Manager Approval field. (This information is pre-populated based on institutional approval information that cannot be edited in the Profile Settings found in Step 2.) Expense claims submitted to the incorrect approver may be returned to you for resubmission or have their approval delayed; this will delay payment of your expense claim.
Delete Spooner, Cheryl from the Manager Approval field and enter Turner, Jill or Sawchyn-Zmud, Coral. The system should generate a clickable list of potential approvers as you continue to type. Once you have selected the appropriate approver (as found in your appointment letter), click Submit Claim.

e. You are now done!
Copying a Previous Expense Claim

a. Concur will allow you to copy previously submitted expense claims the next month. From the home screen, click to choose the Expense menu from the top navigation bar and then click the Claim Library.

b. In the Claim Library window, use the checkboxes to select the appropriate claim to copy and then click Copy Claim.

c. In the Copy Claim window, update the Claim Name and enter a Starting Date for Expense Entries on New Claim and then click OK.

d. You can now review and update the new claim based on previous claim information.