



CONCUR TRAVEL AND EXPENSE TRAINING & DEPLOYMENT

Faculty and Staff,

Effective August 19, 2011, the Seminary officially transitioned to using an automated travel booking and expense reimbursement program. Please read the following details as it specifically relates to you.

1. If you missed one of the 20 training sessions we held earlier in the month, please make sure either you or your administrative assistant performs the following tasks immediately:

- a. Login and change your password immediately.

Website: www.concursolutions.com

User ID: your SBTS email address

Initial password: welcome

(If you are having trouble logging in, please call Ana Williams at ext. 4395.)

- b. Update your profile

- Enable e-receipts.
- Review and verify name (must match drivers license).
- Enter contact information (especially emergency contact information).
- Select your travel preferences.
- Input your travel program membership numbers (air, hotel, rental car, etc.)
- Assign travel assistants, if applicable
- ***Immediately enter your credit card and bank account information. (Booked trips will be charged to your credit card on file and you will receive reimbursement via ACH to you bank account). Concur will deposit a penny into your bank account to verify the information you provided. This process takes three business days and you will not be able to submit reports until it is done.

- c. IMPORTANT: Watch this brief video on how to process an expense reimbursement.

<http://echo360.sbts.edu:8080/ess/echo/presentation/f2741e4a-1414-4547-b87b-cc7b765d87d2>

2. Reimbursement Policy Changes to Note:

- a. Rather than the Accounting Department printing checks twice a week, Concur Travel and Expense will reimburse the employee's bank account within a one-week turnaround. If your expense report is submitted and approved by your supervisor by the close of business on Fridays, then you will receive your reimbursement the follow Thursday night via ACH to your bank account.
- b. The Seminary will transition from paying a flat per diem to reimbursing actual expenses only. The daily allowance for meals is no longer a flat rate of \$31 a day. Rather, it is based on geographic location. The allowance range is \$31-\$46 per day (\$31 being rural areas and \$46 being larger metropolitan and higher cost regions) and is calculated in Concur when you process your report . Please watch the video link above to see how to find out your daily meal allowance.
- c. All in-town and online purchases should be run through your department's procurement card. This is an addition to the existing policy and updates have been shown to reflect this. This will not only cut down on the number of expense reports, but will also eliminate paying taxes on more purchases.

3. Additional Savings to Capture in Your Cost Center:

An added benefit of implementing Concur and Cliqbook is that our new travel agency, Executive Travel (before we used Travel Authority), loaded discounted hotel agreements into the system as of Monday, August 22, 2011. These discounts are worldwide and range from \$10-\$100/night. See information below on how to acquire these rates:

- a. When booking travel, please note that the more you plan in advance, the better rates you will receive on air and hotel. In particular, if you wait until the last minute, our consortium rates may be sold out.

1st – Enter your search parameters.

2nd – Select a hotel you are interested in and click “view rates.”

The screenshot shows two hotel listings. The first listing is for the Hilton New Orleans/St. Charles Avenue, located 0.95 miles away at 333 St. Charles Avenue, New Orleans, LA 70130. It has a 4.5-star rating and a 'View rates' button circled in red. The second listing is for the Omni Royal Crescent Hotel, located 0.96 miles away at 535 Gravier, New Orleans, LA 70130-2701. It also has a 4.5-star rating and a 'View rates' button. Both listings include 'more info' and 'compare' links.

- 3rd – Our Consortium rates will be **designated by the code CBD or CCRA** as shown below. The “best available” rate marks the current rate for everyone else.

The screenshot shows the room rate selection screen for the Sheraton Nashville Downtown Hotel, located 0.21 miles away at 623 Union St, Nashville, TN 37219. The current rate is \$169, with a 'best available' rate of \$209. The 'View rates' button from the previous screenshot is circled in red. The room options are:

- \$169 1k Bed : Ccra: Ccra Traditional Non-smoking:city View:wi-fi Internet For A Fee:37 Inch Lcd Tv:comfortable (Rate Code: B1KCRA) (Apollo)
- \$169 2d Beds : Ccra: Ccra Traditional Non-smoking:city View:wi-fi Internet For A Fee:37 Inch Lcd Tv:comfortable (Rate Code: D2DCRA) (Apollo)
- \$209 1k Bed : Best Available Rate Traditional Non-smoking:city View:wi-fi Internet For A Fee:37 Inch Lcd Tv:comfortable (Rate Code: B1KQR2) (Apollo)
- \$209 2d Beds : Best Available Rate Traditional Non-smoking:city View:wi-fi Internet For A

At the bottom, there is a 'Rate details / Cancellation policy' link, a dropdown menu for 'Use the following Hotel Program:' set to 'No Program selected', and a 'Reserve' button with a checkmark.