Top 10 Tips for Concur

1. All expenses must be **allocated**.
   a. If you have previously used a code for an allocation, it will show up bolded and on the top of the code list.

2. Always include the **employee code** on both the front and allocation pages of an expense.

3. The **business purpose** for an expense is a **brief description** of the expense that, if applicable, includes the name of the event or month that the expense was for (see below). In the **comments section**, include any **additional information** that you think we should know about the expense. *(Please do not only write the expense's program code as the business purpose.)*

4. When submitting for cell phone and internet reimbursement, always include the **name of the month** for which you are being reimbursed in the business purpose.

5. When submitting for mileage reimbursement, always use the **mileage calculator** within Concur as backup. Just as in Google Maps, you can include multiple legs of a trip with this function.

6. There are three categories of meals for which you can be reimbursed within Concur.
   a. **Travel Meal** should be used when a meal only included URJ employees and the total cost of the meal was less than $75;
   b. **Business Meal** should be used if non-URJ employees were present or if the meal was attended by only URJ employees but exceeded $75; and
   c. **Catering** should be used for event-related food expenses.

7. When submitting for reimbursement for any of the three categories of meals, always include the **name of the city** in which it was purchased.

8. When submitting for hotel/lodging reimbursement, you will be prompted to **itemize** the room cost and tax and **allocate** the individual itemizations. Please do not simply allocate the overall cost.

9. If edits are needed, you must use the **"recall"** button in the top right-hand corner of the screen.
   a. Once you have made the edits, don't forget to press **submit** again!

10. Don't forget to press **save** before going to a new page!