

Concur Relocation Expense Report – Job Aid for Participants/Fellows

Once your relocation trip is complete, you will need to submit an **Expense Report** to request reimbursement of expenses.

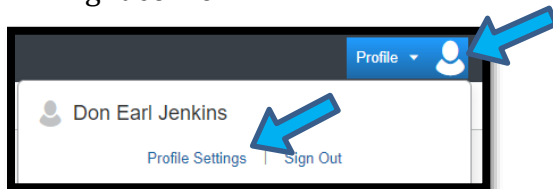
- For more information on relocations, including the ORISE relocation policy, visit the [Relocation](#) section of the ORISE Travel Central website.
- For assistance, contact Travel Central at travelcentral@orau.org.

NOTE:

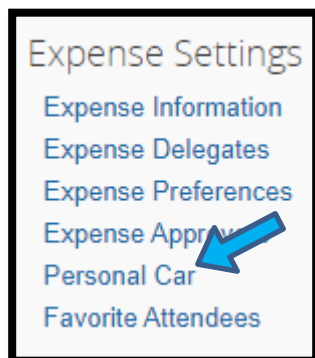
- A **red asterisk *** indicate a required field.
- Grey question marks “?” are **Tool Tips** to assist you. To see the Tool Tips, hover your cursor over the “?”.

Create New Expense Request

- 1) Click on **Request Travel** in Zintellect, to get to the **Concur Home** page.
- 2) Before starting a relocation **Expense Report**, ensure your **Relocation Vehicle** information is correct:
 - a. Go to your **Profile Settings** page by clicking on the blue **Profile** button in the top right corner.



- b. On the left side of the page, under **Expense Settings**, click on **Personal Car**.



- c. The page below will display. If a Relocation Vehicle Type is not indicated, you will first create one by clicking the **New** button and adding the vehicle information.

Personal Car Registration

This page displays all the personal cars that have been registered. Click New to register another car.
Reimbursement Method: Personal Car - Variable Rates

Period for Distance Limits: Annually

Starting Month: January

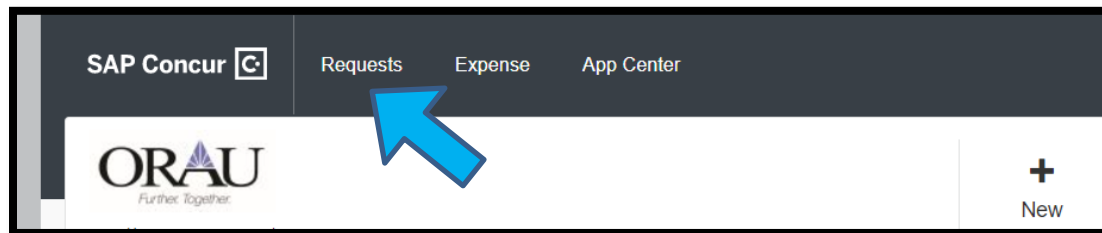
Starting Day: 1

Estimated distance to date (this period): 0 MILE

[New](#) [Remove](#)

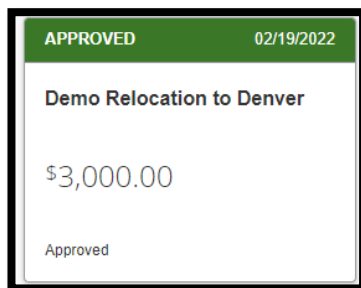
Vehicle ID	Vehicle Type	Active
Car	Travel	Yes
Relocation	Relocation	Yes

3) To create a new **Expense Report**, click on **Requests** in the header:



This will display your **Active Requests** in the system.

4) Click to open the **Relocation Request** for which you will be creating an **Expense Report**:



5) The following page will display the information that was entered into the **Relocation Travel Request**. To create an **Expense Report**, click the **Create Expense Report** button in the top right corner.

Demo Relocation to Denver \$3,000.00

Approved | Request ID: 3AHC

[More Actions](#) [Create Expense Report](#)

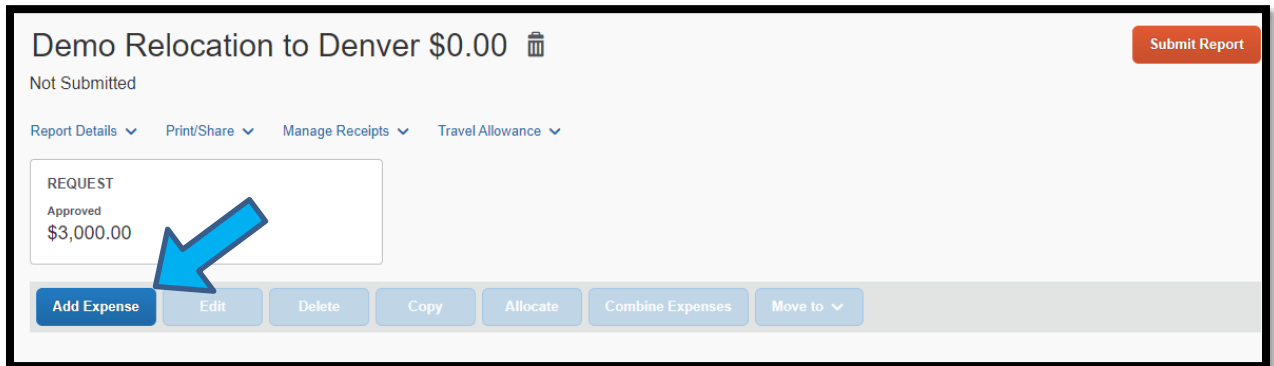
[Request Details](#) [Print/Share](#) [Attachments](#)


EXPECTED EXPENSES

Alerts	Expense type	Details	Date	Amount	Requested
Other			02/19/2022	\$3,000.00	\$3,000.00

Estimated Total: \$3,000.00

The following will be displayed:



Demo Relocation to Denver \$0.00 

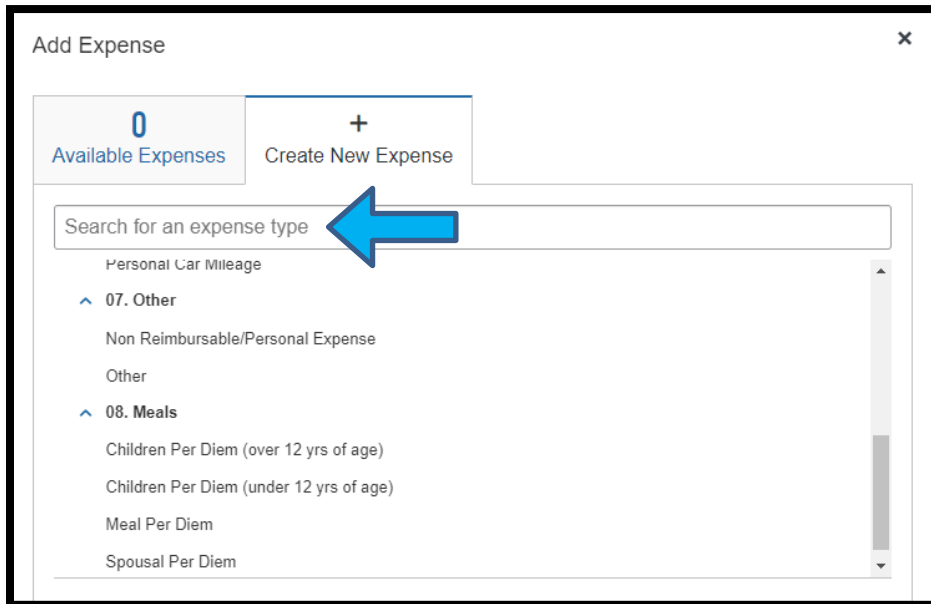
Not Submitted

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

REQUEST
Approved
\$3,000.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

- 6) Click the **Add Expense** button to begin adding expenses. Select the appropriate expense type to start adding expenses.



Add Expense ×

0 Available Expenses + Create New Expense

Search for an expense type

Personal Car Mileage

07. Other

Non Reimbursable/Personal Expense

Other

08. Meals

Children Per Diem (over 12 yrs of age)

Children Per Diem (under 12 yrs of age)

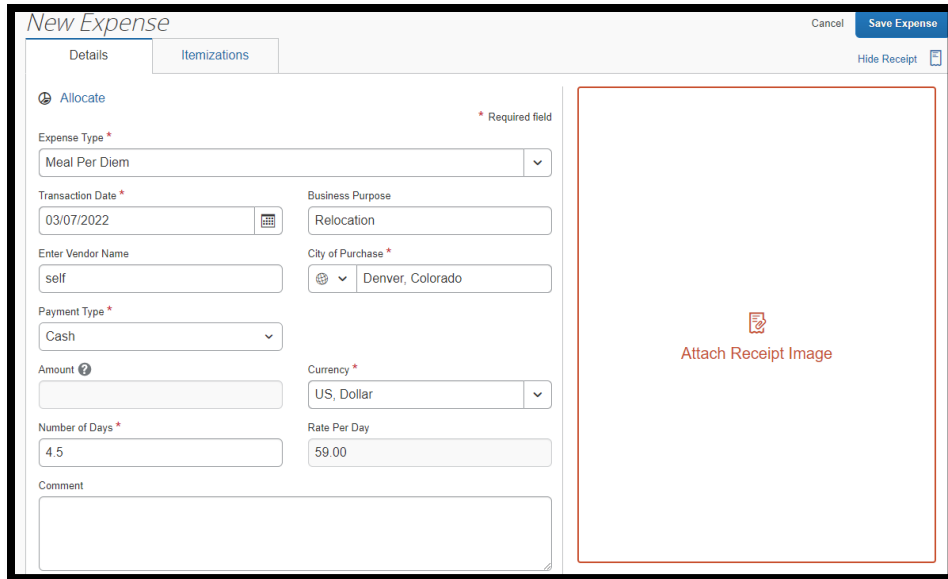
Meal Per Diem

Spousal Per Diem

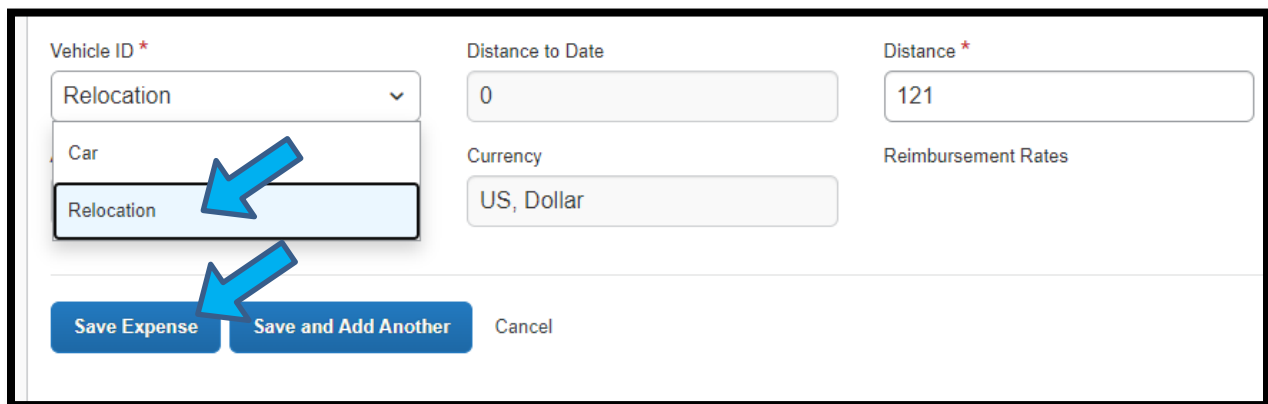
- 7) It is advisable to start with your Per Diem expense (for all members of your family living with you).
- Enter the required information and the amount allowed will display automatically.
 - Click **Save Expense** or **Save and Add Another**.

Notes:

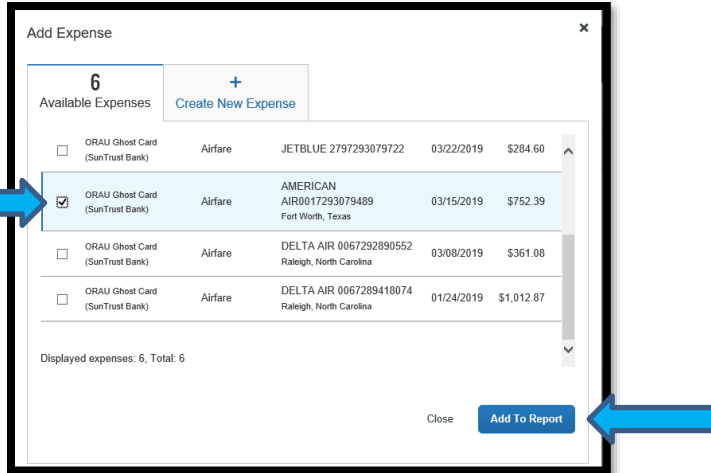
- You will be paid for 75% of the per diem allowance for the first and last days of your trip.
Example: If your trip was 5 days long, you would add 4.5 days in the box indicating the number of days for per diem.
- No receipts are required for meal allowances.



- 8) Continue adding additional expenses including truck rental (under rental vehicle) and lodging (up to \$96 per night). Be sure to include taxes and attach your receipts.
- 9) To add mileage on a personal vehicle that you drove for the relocation:
 - a. Click on the **Personal Car Mileage** expense type and enter the required information.
 - b. Select **Relocation** as your vehicle ID.
 - c. Click **Save Expense** or **Save and Add Another**.



- 10) If there were any prepaid airline tickets purchased by ORAU, add those to the **Expense Report**:
 - a. Select from the **Available Expenses** (list of expenses that were prepaid on your behalf including airline tickets).
 - b. Check the box next to your airline ticket and then click **Add to Report**.



Add Expense

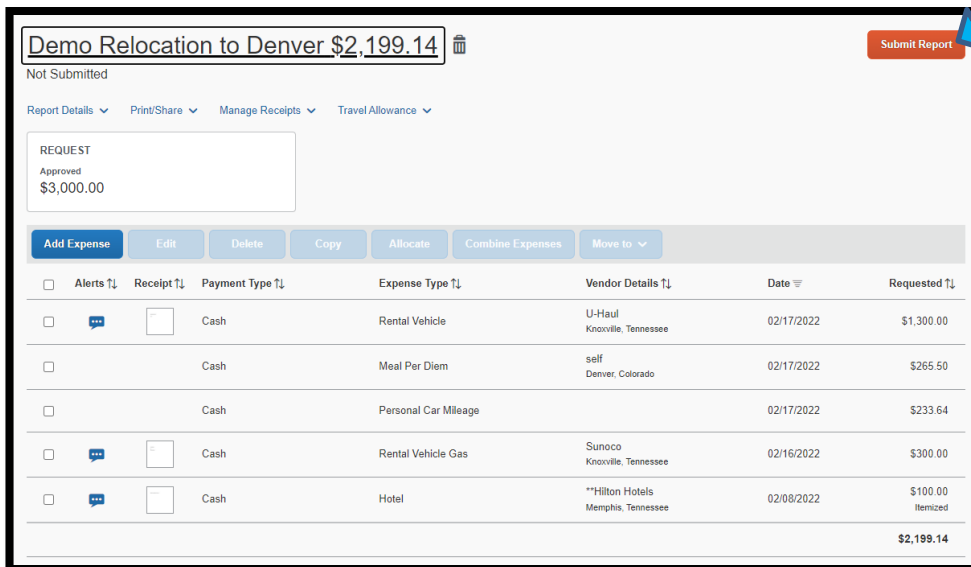
6 Available Expenses [+ Create New Expense](#)


<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	JETBLUE 2797293079722	03/22/2019	\$284.60
<input checked="" type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	AMERICAN AIR0017293079489 Fort Worth, Texas	03/15/2019	\$752.39
<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	DELTA AIR 0067292890552 Raleigh, North Carolina	03/08/2019	\$361.08
<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	DELTA AIR 0067289418074 Raleigh, North Carolina	01/24/2019	\$1,012.87

Displayed expenses: 6, Total: 6

Close [Add To Report](#)

- 11) Add any other expenses to be reimbursed. Some expenses may need to be entered under **"Other"** expense type. Click **Save Expense** after each entry.
- 12) Review the page displaying the list of expenses to ensure all allowable expenses have been entered. If you are finished adding expenses, click **Submit Report** in the top right hand corner to complete the **Expense Request**.









Demo Relocation to Denver \$2,199.14 

Not Submitted

Report Details [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

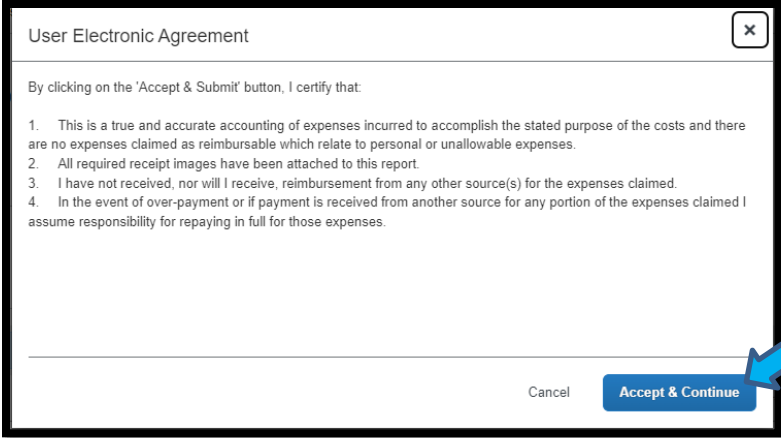
REQUEST
Approved
\$3,000.00

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ↑↓	Requested ↑↓
<input type="checkbox"/>			Cash	Rental Vehicle	U-Haul Knoxville, Tennessee	02/17/2022	\$1,300.00
<input type="checkbox"/>			Cash	Meal Per Diem	self Denver, Colorado	02/17/2022	\$265.50
<input type="checkbox"/>			Cash	Personal Car Mileage		02/17/2022	\$233.64
<input type="checkbox"/>			Cash	Rental Vehicle Gas	Sunoco Knoxville, Tennessee	02/16/2022	\$300.00
<input type="checkbox"/>			Cash	Hotel	Hilton Hotels Memphis, Tennessee	02/08/2022	\$100.00 Itemized
							\$2,199.14

[Submit Report](#)

Once submitted, there will be a Pop-up window to verify the accuracy of the information entered into the **Expense Report**. Click **Accept and Continue**.



A screenshot of a 'User Electronic Agreement' dialog box. The dialog has a title bar with a close button (X). The main content area contains a statement: 'By clicking on the 'Accept & Submit' button, I certify that:' followed by four numbered points. At the bottom, there are two buttons: 'Cancel' and 'Accept & Continue'. A large blue arrow points to the 'Accept & Continue' button.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish the stated purpose of the costs and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of over-payment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying in full for those expenses.

Cancel Accept & Continue

- 13) Once approved, you will receive notification by email stating that the **Expense Report** has been approved and submitted to **Accounts Payable** for processing.