

Quick Concur Instructions for Submitting Expense Reports For NATCA Training Attendees

Once the NATCA Academy Training class has concluded, you will be ready to submit an expense report. You must use Concur because paper vouchers will no longer be accepted. Please note that Concur is only for individual travel charges incurred on behalf of NATCA and reimbursable by National. You should go through your local for any local expenses incurred.

The following instructions are intended to be a quick guide to setting up bank information and submitting an expense report for charges pertaining to NATCA Academy Training. You would have already logged into Concur using the information included in the “**Concur Travel & Expense Training**” pdf document. You can also find more detailed information in that document.

Bank Information Setup:

You must enter your routing number and bank account number 24 hours before you can submit any cash vouchers.

- Click **Profile**
- On the left menu, select **Bank Information** under **Expense Settings**.

Preparing & Submitting an Expense Report:

For any NATCA Academy Training classes, you will need to submit your completed Concur Expense Report through Concur to Carolyn Kamara/Training for approval.

Starting & Submitting a New Expense Report

1. Click **Expense** and then **Create New Report**.
2. **Report Name** should be month and type of class. Example: “February RT1”
3. **Beginning Date** and **Ending Date** should be when the expenses were incurred.
4. Click **Next**.
5. Click **New Expense** and pick an expense that pertains to your travel.
6. Fill in the fields with the **Red Bar** for each expense because those fields are required.
7. Most of these items are self-explanatory.
 - **Business Purpose** will be the same as the Report Name from Step 2 above.
 - **Department** will be **42 Leadership School - Carolyn Kamara**
 - **LM2 Category** will be **5 Union Administration**.
8. Once all the required fields have been filled out, click **Attach Receipt**.
9. Click **Save**.
10. Click **New Expense** and repeat steps 5 to 9 as necessary. Note that if your airfare was prepaid by NATCA National, there is no need to include that expense on your expense report.
11. Once you have filled out all the required fields and attached the receipts for each expense, click **Submit Report, Accept & Submit**.
12. In the **Manager Approval** box, type **Kamara**. The full name **Kamara, Carolyn** will appear. Select the name and click **Submit Report**

For any questions related to NATCA Academy Training reimbursable expenses, please contact Carolyn Kamara at ckamara@natcadc.org or 1-800-266-0895, ext. 4854.

For any questions related to Concur, please contact Preet Virk at pvirk@natcadc.org or 1-800-266-0895, ext. 4827.