

CONCUR INSTRUCTIONS

Concur is NATCA's system for travel booking and expense reimbursement. Now that you are signed up for Concur you will submit all expenses incurred on behalf of NATCA electronically. You should only be submitting one expense report per month. Paper vouchers will no longer be accepted.

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.

Login Instructions:

- Chrome is the recommended browser.
- If using a mobile device or tablet, use of the [Concur App](#) is highly recommended.
- Your Concur **Username** is your email address.
- Click this link to access Concur Travel & Expense: <https://us2.concursolutions.com>
- Enter your **Username** and hit **Next**
- Click **Forgot Password** and hit **Send** to have a password reset link sent to your email
- Upon login, you will be required to set up Two-Factor Authentication. Click [here](#) for detailed instructions.

Profile Setup:

- Update your profile by clicking on **Profile, Profile Settings** and **Personal Information**
- **Bank Information-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**.

Receipts:

To comply with federal regulatory agencies, NATCA still requires a clear, detailed, and itemized receipt of every transaction. However, expense reports with original paper receipts are no longer required. In compliance with DOL and IRS requirements, scanned copies of original unaltered receipts or E-receipts are accepted by NATCA. We still recommend that you store your original receipts in a safe place for up to 5 years.

- **Expenselt**
 - From a verified email address (completed under the **Personal Information** section), receipts may be emailed to receipts@expenseit.com. Receipts will then populate under Available Expenses.
- **E-Receipts Activation**
 - E-receipts provide a detailed feed into Concur for airline, car rental and hotel booked through ConcurTravel.

Booking Travel:

You may book air, hotel and car through Concur. Air travel will be prepaid for by NATCA. However, hotel and car must be paid by the traveler and then reimbursed along with your other out of pocket expenses. If your airfare was prepaid by NATCA National, do not include that expense on your expense report.

Trips booked through Concur require approval before they are finalized. **In order to ensure your travel request goes to the correct approver, you must have the approver listed in your profile before booking travel.** Under **My Profile**, go to **Personal Information**. Under **Company Information**, make sure the correct manager is listed.

For questions regarding travel bookings through Concur please call World Travel at (865) 288-1934.

Preparing & Submitting an Expense Report:

Unless you have transactions that require approval by different budget managers you should only be submitting one expense report a month.

1. Click **Expense** and then **Create New Report**
2. Choose an appropriate **Report Name**
3. **Beginning Date** and **Ending Date** should be when the expenses were incurred
4. Click **Next**
5. Click **Add Expense** and pick an expense that pertains to your travel
6. All fields with the **Red Asterisk** for each expense must be filled out as they are required. Most are self-explanatory but here is further explanation on some of the fields:
 - **Transaction Date** is when payment took place (date on the receipt). For example when an airline ticket was bought and not the travel date.
 - **Business Purpose** should be meaningful to the travel. For example dinner at a February LAT class should be "LAT February" rather than dinner.
 - **Department** should be driven by the business purpose. Couple examples are:
 - Regional Meetings should be charged to the appropriate regional budget (11-19 or 32).
 - NATCA Academy travel should be charged to 42.
 - Some common examples of **LM2 Category** are:
 - 1 Representational: CBA, organizing efforts or recruiting new members
 - 2 Political Activity: NIW, PAC related or other political activities
 - 3 Contributions, Gifts: Charitable contributions
 - 4 General Overhead: This should almost never be used. It is for expenses not allocable to any other category.
 - 5 Union Administration: NATCA Academy, regional meetings.
7. If a transaction includes multiple expense types such as a hotel receipt with hotel, parking, internet, meals; you must click the **Itemization** button to break out the bill.
8. Once all the required fields have been filled out, click **Add Receipt**.
9. After the receipt has been attached, click **Save Expense**
10. Click **Add Expense** and repeat steps 5 to 9 as necessary. Note if your airfare was prepaid by NATCA National, do not 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, Submit Report**.
12. In the **Manager Approval** box, type the last name of the approver until the name appears. Select the name and click **Submit Report**. The person listed under **Department** in Step 6 above is the person that the report must be sent to for approval.

For any questions related to Concur contact Bill Bamford at bbamford@natca.org or 202-220-9816.

Concur Useful Tips

Multi-Edit Transactions

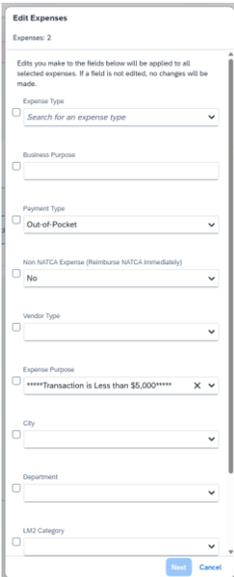
You can select multiple expenses in an expense report and configure common elements across all lines at once.

In the Report window, select two or more expenses and click the **Edit** button.



<input checked="" type="checkbox"/>	Alerts↑	Receipt↑	Payment Type↑	Expense Type↑	Vendor Name↑	Transaction Date↑	Business Purpose↑	Department↑	LM2 Category↑	Date↑	Requested↑	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out-of-Pocket	Hotel		05/29/2025				05/29/2025	\$500.00	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out-of-Pocket	Individual Meals (Breakfast/Lunch/Dinner)	Restaurant	05/29/2025				05/29/2025	\$40.00	...
											\$540.00	

The common fields for the selected Expense Type(s) will be displayed and be editable on the **Edit Expenses** page.



Edit Expenses

Expense: 2

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Expense Type
 Search for an expense type

Business Purpose

Payment Type
 Out-of-Pocket

Non-NATCA Expense (Reimburse NATCA Immediately)
 No

Vendor Type

Expense Purpose
 *****Transaction is Less than \$5,000***** X

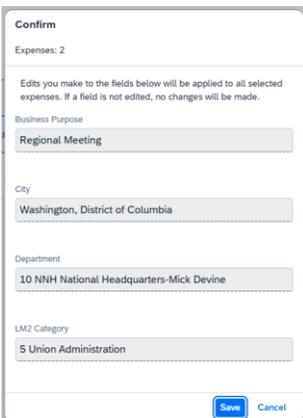
City

Department

LM2 Category

Save Cancel

A confirmation dialog box appears, showing which field(s) will be updated.



Confirm

Expense: 2

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Business Purpose
Regional Meeting

City
Washington, District of Columbia

Department
10 NNH National Headquarters-Mick Devine

LM2 Category
5 Union Administration

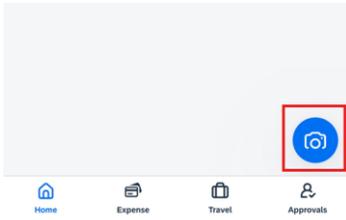
Save Cancel

Concur App

With the Concur app, you can manage your expense reports on your mobile phone as well. By using the app, you can take pictures of receipts in the Concur app and easily move receipts to your expense report. To download, search for SAP Concur in the app store, and click the icon below.



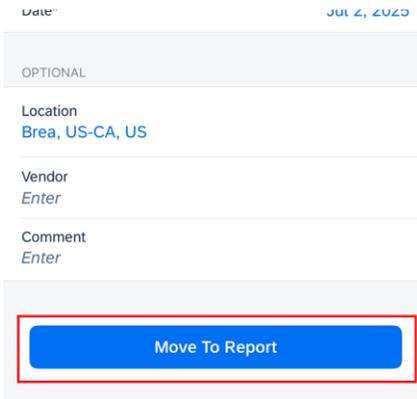
To upload a receipt to your profile on the Concur app, use the “Receipt Camera” icon in the lower right corner of the screen.



Select Allow to give access to your camera for capturing images within the app.

Once the image has been captured press **Done** to add it to your available expenses.

To add the expense to a report, click on the transaction, and select **Move To Report** at the bottom of the screen, and select the report to add the transaction to.



Uber/Lyft Expense Type

To simplify the reimbursement process for Uber/Lyft transactions, Expense Types “Uber/Lyft (Individual)” and “Uber/Lyft (Group)” have been added as options. These Expense Types do not need to have “To” and “From” locations manually entered. However, Uber/Lyft receipts attached to a transaction must have the “To” and “From” information included.

Linking Uber Account

Users can link their Uber account to their Concur account. Once this link is completed, Trip receipts will automatically be sent to Concur Expense. It is still your responsibility to verify the receipt, and submit the expense.

To link your account, in the menu at the top of the desktop screen, select, “App Center”. Search for Uber in the search box at the top of the screen. (Uber should also show up as a Popular User Connection) Click the Uber link, then connect in the next screen.

Receipts@expenseit.com

Users can import transaction receipts to their Concur profile via email. Be guided by the steps below.

To be able to email receipts to Concur, you will first need to have your email address verified on your Concur Profile. To verify your email address:

1. Click the Profile icon near the upper right corner of the home screen.
2. Select **Profile Settings**.
3. On the left-hand side of the screen under Your Information, click **Email Addresses**.
4. Click the **Verify** link. This will trigger the system to send a verification email to the inbox of the address you are verifying.
5. Check your email inbox for an email from **concur.com** with the Subject Line: **Email Verification from Concur Solutions**.
6. Open the email.
7. The email will contain a verification code specific to this email address. Copy the verification code.
8. Navigate back to **Email Addresses** section of your profile.
9. You will now see a field labeled **Enter Code**. Paste the copied code into this field.
10. Under Verify click **OK**.

Important: If you do not receive the verification email, check your Junk or Spam folder.

Once your email address is verified, you can forward your receipts to receipts@expenseit.com. Your receipts will show up in the **Available Receipts** section under the Expense tab. (Receipts can be attachments, or in the body of the email.)

Miscellaneous Concur Reminders

1. **A specific Business Purpose must be included for each transaction.** “Meal” or “Travel” is too vague. For example, “NATCA in Washington”, “NSO Regional Meeting” or “Meeting at the FAA with (name)” are sufficient Business Purposes.
2. **LM category 4 should almost never be used.** Most transactions fit into LM categories 1, 2, 3, and 5. Be guided by LM category descriptions below. Further detail can be found on page 12 of the NATCA National Expense Policy.
 1. Representational: CBA, organizing efforts or recruiting new members
 2. Political Activity: NiW, PAC related or other political activities
 3. Contributions, Gifts: Charitable contributions
 4. General Overhead: This should almost never be used. It is for expenses not allocable to any other category.
 5. Union Administration: NATCA Academy, regional meetings.
3. **For purchases of giveaways individually valued at a T-Shirt or more, you must include names of all recipients along with your receipt.** Broad categories such as “Members” are not sufficient.
4. **Itemized receipts must be submitted.** If a receipt is lost/not provided, please reach out to the vendor to obtain the needed receipt. If unavailable, provide a comment stating that an itemized receipt was not available. Here is the pertinent section from the NATCA National Expense Policy:
 - Itemized receipts for all expenses, including meals, should be submitted if an itemized receipt is provided or available. An itemized receipt is defined as a receipt that accounts for all items, food, drink, and/or services purchased.