

Crucial Connections

EXPENSE REPORT INSTRUCTIONS

1. Follow the [Crucial Learning Travel & Expense Policy](#) and the [Event Travel & Expense Policy](#) which details what can or cannot be reimbursed.
2. Submit only 1 report within 15 days of travel.
3. Any reports submitted after 2 months will not be reimbursable.

Please help us be responsible stewards of company funds by limiting the number of reports you submit as Concur charges per expense report submitted. If you forget to add an expense item after submitting your report, simply email ap@cruciallearning.com to have it sent back to you for editing.

HOW TO SUBMIT AN EXPENSE REPORT IN CONCUR

1. Login to [SAP Concur](#) using your Crucial Learning email address or Okta. If you need help accessing your account or resetting your password, contact ap@cruciallearning.com.
 - If you haven't already, set up your direct deposit account. Click the top right "**Profile**" icon and select "**Profile Settings**" and update all the fields under "**Bank Information**". Reimbursement payments will be directly deposited into the account of your choice.
2. Go to the "**Expense**" tab from the main menu and click "**Create New Report**". Or select "**Start a Report**" from your Concur home page.
3. Fill out the required and optional fields below and click "**Create Report**".
 - **Report Name:** Crucial Connections Aug 2024
 - **Department:** Keep your default department
 - **Revenue Producing:** No
 - **Billable:** No
 - **Program Related:** No
 - **Event Code:** (2578) Crucial Connections Aug 2024
4. Open your newly created report and click "**Add Expense**" and choose either "**Available Expenses**" or "**Create New Expense**".
 - Select the appropriate expense type based on the recommended table on page 2.
 - Upload all receipts. Receipts are required for all expenses, regardless of the amount. [Download the Concur mobile app](#) to easily upload receipts directly from your phone.
5. After all expenses have been added, a receipt is attached, and comments have been added, click "**Submit Report**". Your report may be returned if any corrections are required or certain expenses are not reimbursable.

EXPENSE TYPE	USAGE & INSTRUCTIONS
Individual Domestic Meals 63600	Personal food or drink items purchased while traveling. Includes meals, snacks, gum, candy, coffee, bottled water, tips (up to 20%), and taxes. Attributed to your daily maximum limit.
Internal Group Meal 63600	Any group meal with 2 or more employees. Add each employee's name who joined the meal to the comments section.
Airfare 63100	Upon booking your flight in Concur, an available expense will automatically be created for you to add to your report. Submit your report in the same month your flight is booked.
Airline Fees 63100	The first checked bag and a carry-on are reimbursable expenses. Overweight baggage fees are not reimbursable.
Agency Booking Fees 63100	Concur charges \$5 for each booking.
Personal Car Mileage 63400	Personal car mileage for approved trips. Use the route calculator tool in Concur to add up your mileage. Comment with the trip's starting and ending destination and include the number of passengers if carpooling.
Car Rental 63300	Car rentals will be assigned and should not be booked unless assigned by your Excom leader. Do not request mileage reimbursement for a rental vehicle. You may only request "63300-Fuel" reimbursement for rental vehicles.
Fuel 63300	Fuel will only be reimbursed for assigned rental vehicles. For personal vehicles, you should use the "Personal Car Mileage" expense type instead of "Fuel".
Parking 63500	Use this expense for parking at the airport or the event venue hotel.
Taxi/Bus/Subway 63500	Use for any rideshare (Uber/Lyft), taxi, bus, UTA, Trax.
Employee Relations 67600	Use this code for any team activities, team activity supplies, swag, meals, or prizes used during the designated team day on August 8. This will be charged to your <u>department budget</u> instead of the Crucial Connections event budget. Include a comment with your team activity, meal, or supply with details (who/what/where/why).
Gift Card 67600	Use this code for gift cards. Any gift cards over \$25 require the name of the recipient to be submitted to accounting. Add a note with the gift card recipient's name and why it was given.