

- All reimbursements requested after 90 days of the completion of travel, fall outside the reasonable timeframe for IRS accountable plans, are subject to income tax and will be reported on the employee's Form W-2.

**Attach Travel Receipt to an Individual Transaction**

You may attach receipts to individual transaction line items by uploading scanned receipts saved on your computer or within your Concur account.

**Allocating Charges between multiple Expense Types**

To allocate charges between multiple Organization Accounts and expense types, the transaction must be Itemized and/or Allocated. Itemization (allocating between multiple account codes) must be completed prior to Allocation (allocating between multiple Organization Numbers/Funds)

- Itemization**

If you need to split a transaction between multiple Expense Types, you must use the Itemize feature.

- Allocation**

If you need to allocate to an Organization Number/Fund that is different from the default accounting stream in your profile or you need to split a transaction between multiple organization number, fund, orgs, and programs you must use the allocation feature.

**UA Travel Website**

<https://www.alaska.edu/travel>

**Need Assistance**



**Contact:** 907-450-8785 (TRVL)  
**Email:** [ua-travel@alaska.edu](mailto:ua-travel@alaska.edu)



**UNIVERSITY of ALASKA ANCHORAGE™**  
**Contact:** 907-786-1444  
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**UNIVERSITY of ALASKA SOUTHEAST**  
**Contact:** 907-796-6491  
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	<p><b>JP Morgan Fraud line</b> US/Canada 800-316-6056 International 847-488-3748 <b>UA Contact:</b> Denise Caissie <a href="mailto:dcaissie@alaska.edu">dcaissie@alaska.edu</a> 907-474-7374</p>
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**UA Travel Booking Agency**



**Contact:** 907-786-0107  
**Toll Free:** 833-500-4292  
**Technical:** 877-208-1396  
**Email:** [ua@travelctm.com](mailto:ua@travelctm.com)

**Quick Reference Guide**

**Log into UA Travel Concur**  
<https://www.alaska.edu/concur>  
Use your UA Online single sign on (SSO) User Name and Password, **click Login**

**First Time User**

- ✓ Before you use the UA Travel Concur Tool for the first time, **update your Travel Profile**. Even if you make no changes, you must **save** your profile before you book a trip.
- ✓ Setup **Travel Assistants, Delegates and/or Travel Arrangers**.
- ✓ **Setup Mobile Apps** (Concur, Triplt, and E-Receipts). This will allow you to take pictures of receipts, review/approve or create expense reports from your mobile device.
- ✓ Review current **UA Travel Regulations and Guidelines**.
- ✓ Apply online for a **UA Travel Card**. One of the many benefits of a UA Travel Card is that all charges import directly into your online Concur expense report ready to be reconciled after travel is completed.
- ✓ Setup a **Direct Deposit Account** through UAOnline (different from your payroll). Direct deposit enrollment allows travel reimbursements to be deposited directly into your designated bank account.

## Before Travel

### Creating and Submitting a Request (Travel Authorization)

1. **Select** *Start a Request*.
2. Fill out all required fields marked in **red** on the **Request Header tab**.
3. On the **Segments tab**, you will enter trip details and estimated amounts for each segment. The most common segments are Air, Car Rental, and Hotel. Be sure to fill out the mandatory Trip Segment(s) expense even if you only have one destination.
4. **Select** an expense category on the right and fill out all required fields. Repeat for each planned expense. Once all fields are complete, verify all accounting information is correct.
5. **Click** *Submit Request* for approval.
6. If the **Request is approved an email** will generate to the traveler to finish the booking process.

**International Travel** – If restricted funds are used for international travel it must be authorized by the granting agency. Travel abroad also requires additional university resources based on Export Controls compliance, Fly America Act, etc.

### Booking Your Travel

#### **(Request and Travel Integration)**

- UA Travel – Concur is a robust booking tool providing travelers and/or their delegates with Air, Rail, Car, and Hotel booking options.
- Once the Request is approved, go to the UA Travel-Concur home screen and click Request to see a list of Active Requests.
- Find the approved Request and click the Book link in the right status column. This will launch the booking tool with pre-populated Request information.

- Simply enter dates and destination and Concur Travel will show preferred airlines, such as Alaska Airlines, offering the university negotiated discounts along with car rental partners and discount hotel rates.
- **Click** to purchase based on your **approved Request information**.

**Rural Alaska Travel** - Traveler's will book their travel through the CTM Booking Agency **Rural Website**. The website is embedded in **Company Notes Section** on the Concur homepage. Scroll down through the section to select for rural booking options.

## During Travel

### Launch UA Travel – Triplt Mobile

Triplt is the travel organizing app that automatically creates a master itinerary for every trip so you can access your travel plans, anytime, on any device.

### Launch UA Travel-Concur Mobile

1. Download the Concur Mobile App on your device.
2. Through your Concur Profile, create a Mobile PIN.
3. Login to the App on your device using your UA [username@Alaska.edu](mailto:username@Alaska.edu) and your four digit Mobile Pin created above.

### Travel Receipts

- Save your travel receipts (excluding receipts that fall within your per diem allocation) for expense reconciliation after travel.
- Scan receipts for airline, hotel, car rental and other travel incidentals for reimbursements.

## Attaching Expense Receipts to your Expense Report while traveling

There are several ways to attach receipts:

- Use the Concur Mobile App to take pictures with your phone or tablet. The app is connected with the traveler's profile and will flow into the traveler's available receipts automatically.
- Travelers or delegates may also take pictures or scan receipts and send them to [receipts@concur.com](mailto:receipts@concur.com), put the traveler's Alaska.edu email address in the subject line of the email and attach the receipt images. The receipts will flow into the traveler's available receipts in Concur.
- Attachment files (receipts and documents) must be a PNG, JPG, PDF, HTML, or TIF file format.

## After Travel

### Create an Expense Report from Completed Trip

1. Ensure that all of your receipts have been loaded into your Concur receipts for reconciliation.
2. The expense report located in Concur will have the same name as your trip itinerary and contains all the expense entries for each of the trip reservations, including your airfare, hotel, and car rental booked through the Concur tool.
3. Properly completed and approved travel expense reports with a reimbursable balance will be paid within 15 business days.
4. Personal travel expenses, outside of the university travel reimbursement policy, will be subtracted after all reimbursable costs have been deducted from reimbursable expenses first. Any remaining personal expense owed balance will be deducted through the UA employee payroll deduction process.