Travel & Expense Quick Reference Guide

TRAVEL & EXPENSE

Travel & Expense (T&E) refers to the policies, procedures and systems used for initiating, managing and supporting the necessary travel and business hosting needs of the University. At the SSC, the Travel & Expense team will provide employee expense report creation services using Concur.

HOW TO REQUEST SERVICE

Expense Report Creation:

1. Email us at ExpenseReports@umich.edu
2. Include in your email subject: "PCard" and/or "Reimbursement" as well as identifying information that will help distinguish this request from others
3. Attach receipts and/or supporting documentation
4. Include the ShortCode and Business Purpose

Additional Tips:

1. ***For PCard expenses***: email receipts/information as expenses are incurred or at a minimum, before the 8th business day before the end of the month (e.g., for April 2015, provide this information by April 21st).

2. ***If an approver or auditor sends back a report*** and you want SSC assistance correcting the report, email ExpenseReports@umich.edu to request help.

3. ***If you put a receipt in the Concur Receipt Store***, the SSC will not know it's there unless you email ExpenseReports@umich.edu.

4. ***Copy ExpenseReports@umich.edu on all emails to receipts@concur.com***. Be sure to include the ShortCode and business purpose in the email or on the receipt.

HOW TO CONTACT US

PHONE	EMAIL	eFORMS	WEBSITE INFO
734-615-2000 PRESS #4	ExpenseReports@umich.edu		Travel & Expense Report Creation Information on the SSC website

TIPS TO EXPEDITE SERVICE

- Receipt dates, amounts, names and locations must be ***visible and legible***. Do not tape over information nor highlight information on thermal receipts.
- ***If you scan a receipt directly from a printer*** to ExpenseReports@umich.edu, put your uniqname on the receipt or on a coversheet accompanying the receipt.
- ***If you email receipts related to the same report in separate emails***, include the content of the first email. EXAMPLE "I will be sending 10 receipts for the 2015 Concur conference expense report. Receipt 1/10." Subsequent emails, "2/10," "3/10" etc. and indicate when you are sending the final email. EXAMPLE: "This is the last receipt I will send for the 2015 Concur conference expense report."
- Reply to your ***original email*** with additional information about the same report. This will keep all elements of the exchange in a single Gmail conversation/thread and will keep all elements of the exchange in a single case for the SSC.
- When sending a new report request, *do not* reply through previous email.
- *Do not* send expense report requests to sharedservices@umich.edu. This will delay processing your request as it will go through a triage process.
- *Do not* email a service request directly to a specific SSC T&E staff member. This will delay processing your request as it will be forwarded to ExpenseReports@umich.edu.

ADDITIONAL RESOURCES & HELP

QUICKLINKS:

Employee Travel/Expense Cover Page
Employee Hosting Report
Employee Other Expenses Report

SHARED SERVICES CENTER- UNIVERSITY OF MICHIGAN