

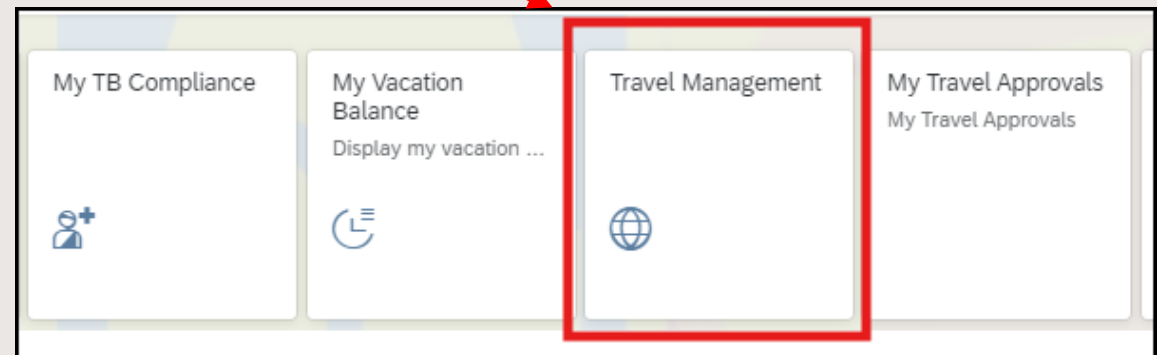


LAUSD
UNIFIED

Concur Travel Policy Training

SAP Concur Travel

- Concur Travel replaced paper-based 10.12.1 Conference Attendance Requests
- Travel Freeze approval required – obtained online
- Concur Access Link
 - Log in to ESS (<https://ess.lausd.net>) with your SSO and click on “Travel Management” tile



SAP Concur Travel (resources, job aids)

Read the Company Notes on the Concur Homepage

SAP ConcurHome

Create

Required Approvals0

Authorization Requests2

Available Expenses0

Expense Reports2

Company Notes

Announcement

READ HERE BEFORE CREATING A TRAVEL REQUEST.

When submitting the travel request, make sure to put the NAME OF THE CONFERENCE under "Request Name". Do not enter the name of the traveler.

Read More

Available Expenses

Expense Reports (2)

Approvals

Requests (2)

Training Videos, job aids, resources
<https://www.lausd.org/Page/19728>

PROCUREMENT SERVICES DIVISION

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Travel

Professional Services

Goods and General Services

LAUSD Virtual Assistant

We are pleased to announce that SAP Concur is LIVE for Schools and Central Offices!

SAP Concur

As of April 1st, 2024 all employee conference attendance requests should be entered in the new Concur travel system. SAA's or those that have been designated by the School or Office as the Site Travel Specialists (STS) have access to enter conference and travel requests on behalf of employees for their school/office. Complete Travel Requests must be entered in Concur no later than 30 days before local and in-state trips or 45 days before out-of-state trips.

Support

Concur Travel Policy Training Presentation

Job Aids

Concur Training Videos

Helpful Resources

Travel Bulletin

Step-by-Step Overview for Travel Request (School)

1

1. Create travel request to request for approval to attend the conference/event.
2. Enter all "expected expenses"
3. Enter funding allocation(s)
4. Upload required documents

2

Request will go through budget check

If budget check fails, an email notification is sent to STS and employee

4

Routes to Principal/Site Administrator for approval. Then to the Region Superintendent's Office.

If using a different funding cost center, request will also route to that cost center's administrator

5

Routes to Travel Unit for review

Travel Desk will reject if information is entered incorrectly or there is missing documents.

6

Routes to Deputy Superintendent and Deputy Superintendent of Instructions.

If out-of-state, then to the Office of Superintendent

7


Upon obtaining approval, Concur's request status will change to **"Approved"**. Email notification of approval will be sent to STS and employee.

*Email approval replaces ATRN

Required Documents

- [Conference Justification Form](#) (limit to one page, no additional pages are accepted.)
- Conference/event brochure or agenda stating
 - Name
 - Location
 - Dates
 - Conference Fee
- Screenshot/printout of Google Maps showing mileage from school/work location to event location

Only upload required documents. Do not upload unnecessary pages.



CONFERENCE JUSTIFICATION AND FREEZE FORM

Employee Name: _____ Trip # _____
Employee No. _____ Title: _____
Division/School Name: _____
Name of Conference: _____
Conference Location: _____ Date(s) of Travel: _____
How many conferences have you attended this fiscal year (July - June)? _____
Are you planning to attend any other conference besides this one this fiscal year (July- June)?
☒ Yes ☐ No If yes, how many _____ when? _____
Will a substitute be required to cover your absence? ☐ Yes ☐ No
Choose an item below
1. How will this travel request be paid? _____
If paid by third party specify who and why? _____
2. What happens at this training/conference? (300 character limit)

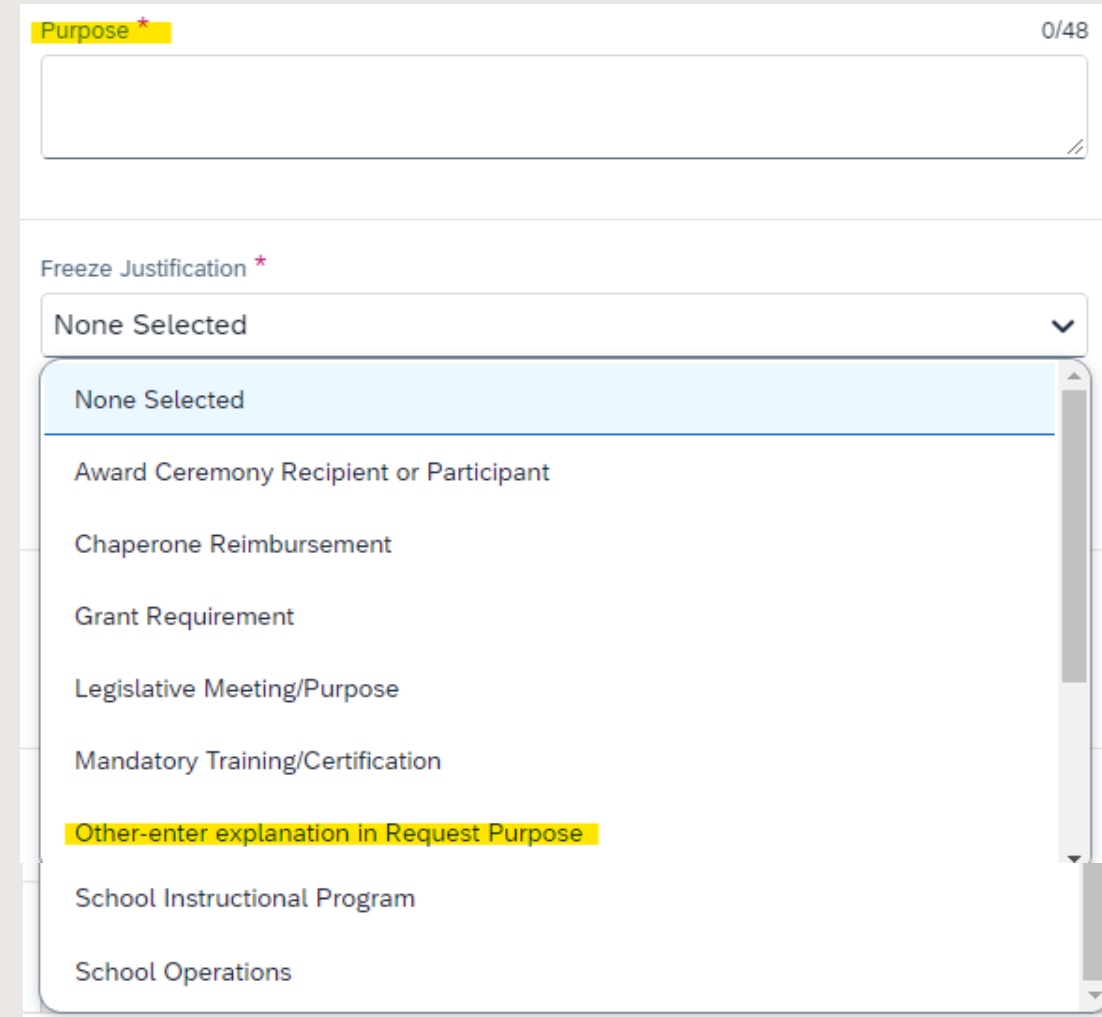
3. How will this training/conference have a direct impact on your work? (300 limit)

4. Why is it essential that you attend? (300 limit)

Please limit the justification to a single page. No additional pages will be accepted.

Freeze Justification Field in Concur

- Due to the travel freeze, all district employees must complete a Travel Freeze Justification field in Concur using the dropdown menu
 - If you select **Other**, explain the reason in the Purpose field. Be specific such as presenting on behalf of LAUSD, required grant training, award recipient, PD, etc.
- All out-of-state travel requires further approval from the Office of Superintendent which is obtained through Concur.



The screenshot displays a web form interface. At the top, there is a yellow header bar with the text "Purpose *" on the left and "0/48" on the right. Below this is a large, empty white text box. Underneath the text box is a section titled "Freeze Justification *" in red. This section contains a dropdown menu. The dropdown menu is currently open, showing a list of options. The first option is "None Selected" in a light blue background. Below it are several other options: "Award Ceremony Recipient or Participant", "Chaperone Reimbursement", "Grant Requirement", "Legislative Meeting/Purpose", "Mandatory Training/Certification", "Other-enter explanation in Request Purpose" (which is highlighted in yellow), "School Instructional Program", and "School Operations". The dropdown menu has a scroll bar on the right side.

Funding is required for all travel requests

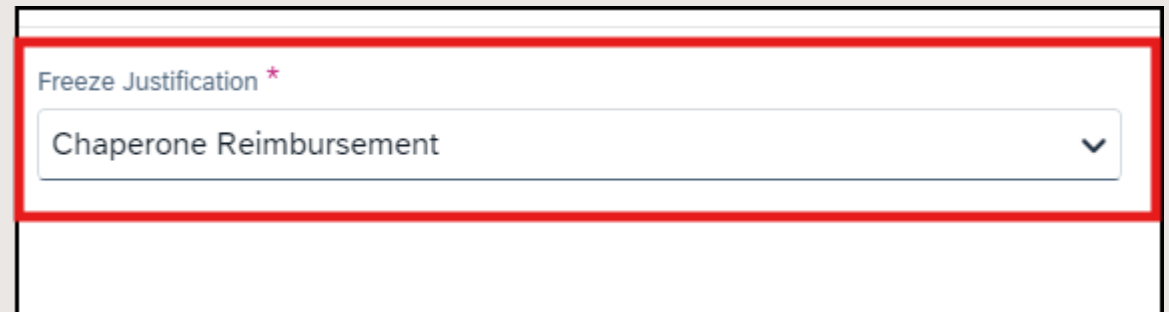
- Yes, even if it's a no-cost trip!
- Determine the funding
 - All requests require a funding line in Concur. Funds must be allocated to G/L 520002
- If teachers are submitting their own request, SAA must provide them the appropriate funding information.

Can I go to the event without approval?

- Traveler who attend trips without approval may NOT be reimbursed for expenses
- Retroactive (after-the-fact) requests are no longer accepted
- Do not use District P-Card for travel expenses without prior approval.

Field Trips?

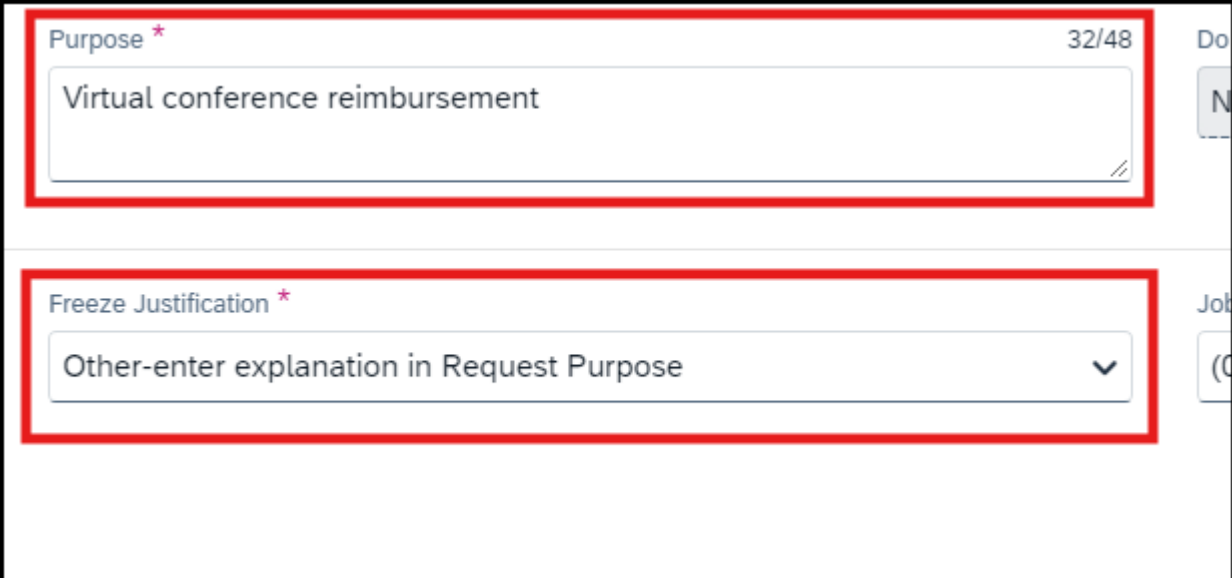
- Field Trip approvals are obtained in the ifieldtrip system through Risk Management
- Concur Travel is **not** for field trips. Student travel cannot be entered or booked through Concur.
- Field trip request is only entered in Concur for employee reimbursements of out-of-pocket costs.
- Upload proof of ifieldtrip approval and field trip brochure/event information
- Choose **Chaperone Reimbursement** for Freeze Justification in Concur



A screenshot of a web form interface. At the top, there is a label 'Freeze Justification' followed by a red asterisk. Below this label is a dropdown menu. The dropdown menu is open, showing the selected option 'Chaperone Reimbursement' and a downward-pointing chevron icon on the right. The entire form area is enclosed in a red rectangular border.

Virtual Conferences

- Request entry is not needed for virtual conferences
- Submit a Concur travel request for virtual conferences/webinars/training **only if you are self-paying and seeking reimbursement for the registration fee**
- If reimbursement is needed, enter “Virtual conference reimbursement” in the Freeze Justification Purpose field




The screenshot displays a portion of a Concur travel request form. Two fields are highlighted with red rectangular boxes. The first field, labeled 'Purpose *' with a character count of 32/48, contains the text 'Virtual conference reimbursement'. The second field, labeled 'Freeze Justification *', is a dropdown menu currently showing 'Other-enter explanation in Request Purpose' with a downward arrow icon. To the right of these fields, parts of other form elements are visible, including a 'Do' button, a 'Job' dropdown, and a '(0)' indicator.

No-cost conference (\$0 cost to the District)

- Add the conference fee expense with the total amount of \$0
- A valid funding allocation is REQUIRED even if the cost is \$0
- Add a comment in the conference fee expense explaining if the conference is free or if there is a third party paying for the costs (hotel, airfare, substitutes, etc.) & include the name of the sponsoring party

New Expense:Conference Fees

 Allocate

Transaction Date *	Business Purpose	0/48
02/05/2025		
Transaction Amount *	Currency *	Vendor Name *
0.00	US, Dollar (USD)	ACSA
Payment type *		
Self-Paid		
Comment *		
All costs covered by ACSA		

Submission Deadline – Policy

Local and In-State Trips: The submission deadline is now 30 calendar days prior to the trip (previously 20 business days).

Out-of-State or International Trips: The submission deadline is now 45 calendar days prior to the trip (previously 30 business days).

The submission deadline is the date the Travel Desk receives **all** required forms, approvals, and documentation for your trip. A packet is considered complete only when everything is included and all sections are entered correctly. **If anything is missing or incorrect, your packet will be returned, and you'll need to resubmit it.** The date the Travel Desk receives the corrected packet will be your new submission date.

Requests failing to meet this submission deadline will not be considered and will be rejected.

Hotel Expense & Travel Duration – Policy

- Hotel expenses **should not exceed \$300/night including taxes and fees** without appropriate documentation and choosing the correct Hotel Business Purpose. If the traveler is covering the exceeded amount, employee must self-pay and request reimbursement after the trip.
- Travel is allowed **one day prior and one day following the event**. Employees are responsible for any additional days

Hotel Business Purpose *	
None Selected	
*Hotel expense is less than \$300 USD per night	
Added costs for other hotel out of area.	
Admin approved - 2 or more employees in 1 room.	
Admin approved - Event located on hotel site.	
Admin approved - Health/safety concerns.	
Admin approved - Hotel rate is higher for area.	

Concur Travel Request Checklist

This form is **NOT** required. It is a useful tool for Site Travel Specialist(STS) when entering on behalf of an employee

School: Concur Travel Request Checklist

This form will be helpful to provide estimated expenses to the STS to request conference attendance/travel approval.

Attach/provide your STS with the following information:

- Freeze Form with justification section filled out (**signed** by Principal)
- Transmittal Form for out-of-state travel
- Division of Instruction required Justification
- Conference flyer stating the date, location & conference fee
- 3 estimates for airfare, hotel and car rental (if the expenses are covered by District) -*Screenshot or printout of the estimates are acceptable*

Traveler Information

Today's Date:

First Name:

MI:

Last Name:

Request Name (Name of event):

Trip Activity Type:

☐ Conference – CLASSIFIED

☐ Conference – CERTIFICATED

☐ Contractor Audits

☐ Field Trip – Chaperones

☐ Legislative

☐ Peer Review

☐ Plant Inspection

☐ Recruitment

☐ Other Travel

☐ Training/Prof Dev – CLASSIFIED

☐ Training/Prof Dev – CERTIFICATED

Travel Start Date:

Travel End Date:

Travel Destination: ☐ Local (within 45 miles)

☐ In State

☐ International

☐ Out of State

Main Destination City:

Main Destination Country/Region:

Purpose (Reason for your attendance):

48 characters limit

Additional Comments:

Employee ID #:

Cost Center:

Travel Expense Information

☐ Conference Fee or ☐ Seminar/Course Fee

\$

Vendor Name/Name of Conference:

☐ Self-Paid

☐ District Prepaid

☐ Air Ticket: \$

☐ Self-Paid

☐ District Prepaid

Departure Location:

Return Location:

Airline:

Per Diem

Travelers are allowed per diem outside of 45 miles from employee's school/work and no meals are being provided by the event. The system will automatically calculate the per diem amount based on the information you provide.


Half-Day Per Diem:

- Lunch OR dinner is included
- Traveler leaves for the trip after noon
- Traveler returns home before noon

Full-Day Per Diem:


- Lunch AND dinner are not included
- Traveler leaves for the trip before noon
- Traveler returns home after noon

New Expense:Per Diem

 [Allocate](#)

Business Purpose 0/48

Trip Start Date *


05/05/2025 

Trip End Date *


05/05/2025

Total Number Days of Trip *


Total number of days on the trip

Number of Full Days * 

How many are full days?

Number of Half Days * 

How many are half days?

Number of Meals Provided * 

How many meals provided by the vendor? Only count lunch and dinner.

Principal's Approval In Concur

- Approval in Concur is very simple, but the information must be carefully reviewed before clicking "Approve"
- Job Aide-[Approvers- How to View and Approve Travel Requests and Expense Reports](#)
 - Shows how to view the attachments to ensure that required documents are uploaded
 - Outlines the information that should be verified for correctness.
- Approving a request that is not correct will be rejected at later approval levels, will cause delays in the overall trip approval, and may cause the trip to be **canceled** due to lack of time for final approvals

Travel Details

This is to inform you that the following Travel Request has been submitted for your review and approval.

Trip Number	3FCG
Employee Name	
Employee Number	
Personnel Number	
Position	SOC WKR,PSY
Cost Center	0001082401Mental Hlth Svcs-Itinerant
Trip Name	NPS RTC Nov 13-15/24 Devereux GA
Trip Purpose	CA Ed Code Section 56366.1 Requirement
Trip Start Date	11/13/2024
Trip End Date	11/15/2024
Travel Destination	Out of State
Main Destination City	Kennesaw, Georgia
Main Destination Country/Region	US
Freeze Justification	Other-enter explanation in Request Purpose
Trip Amount	\$1,198.25

Expense Type	Expense Date	Expense Amount	Payment Type
Baggage Fees	10/15/2024	\$50.00	LAUSD District Paid
Per Diem	10/15/2024	\$147.00	Self-Paid
Airfare	10/15/2024	\$596.96	LAUSD District Paid
Hotel	10/15/2024	\$304.29	LAUSD District Paid
Parking	10/15/2024	\$100.00	Self-Paid

CO Type	Cost Object	Fund	Functional Area
CC	0001123901		

Hotel Business Purpose	*Hotel expense is less than \$300 USD per night
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- 1) Ensure that the name of the conference is in the "Trip Name" field. The employee's name should not be here.
- 2) The "Trip Purpose" field should have a valid reason for the travel (i.e. Grant Requirement, Professional Development, Training, etc.) or the Freeze explanation.
- 3) The "Trip Start" date should be the date of departure & the "Trip End Date" should be the date of the return from the trip.
- 4) Make sure the "Travel Destination" field is correct. (Local = within 45 miles each way)
- 5) If "Other" is selected for the "Freeze Justification" there **MUST** be a valid **reason** in the "Purpose" field.
- 6) Ensure that the "Hotel Business Purpose" statement is correct. District policy currently states that hotel costs should not exceed \$300 per night, including taxes & fees.
- 7) All expenses must be listed as either "LAUSD District Paid" or "Self-Paid". The only exception is when the Hotel or Airfare will be booked with the Concur Booking tools, in which case the expenses must be paid via the "Virtual Card"

If you have any questions or need assistance, please contact the Travel Desk at procurement.traveldesk@lausd.net or (562) 654-9058.

Approve Reject

Why Was the Travel Request Rejected?

Travel requests can be rejected for various reasons. Some of these reasons include:

1. The travel request was not submitted early enough for the request to route to all required approvers
2. The traveler's name was incorrectly put in the "Request Name" field in the header.
 - The Name of the Conference or Event must be entered in the "Request Name" field
3. The "Purpose" field has a copy/paste of the conference name instead of a valid reason
4. The travel request is missing some or all the required documentation (Flyer/brochure, mileage map, Conference Justification Form)
5. The travel request is for a date that has already passed
6. The payment type for an expense is incorrect or incompatible with the request
7. The "Hotel Business Purpose" statement in the Hotel expense is incorrect

Refer to the ["How to Check the Status of My Travel Request or Expense Report"](#) for instructions on how to review the rejection notes. Site Travel Specialists can check [here](#).



P-Card Policy

- Due to travel freeze – If you are using the P-Card to pay for travel expenses:
 1. Submit the Concur Request approval email to your P-Card Representative
 2. If the travel expenses are above the P-Card limit, **include a Credit Card Exception Request Form.**

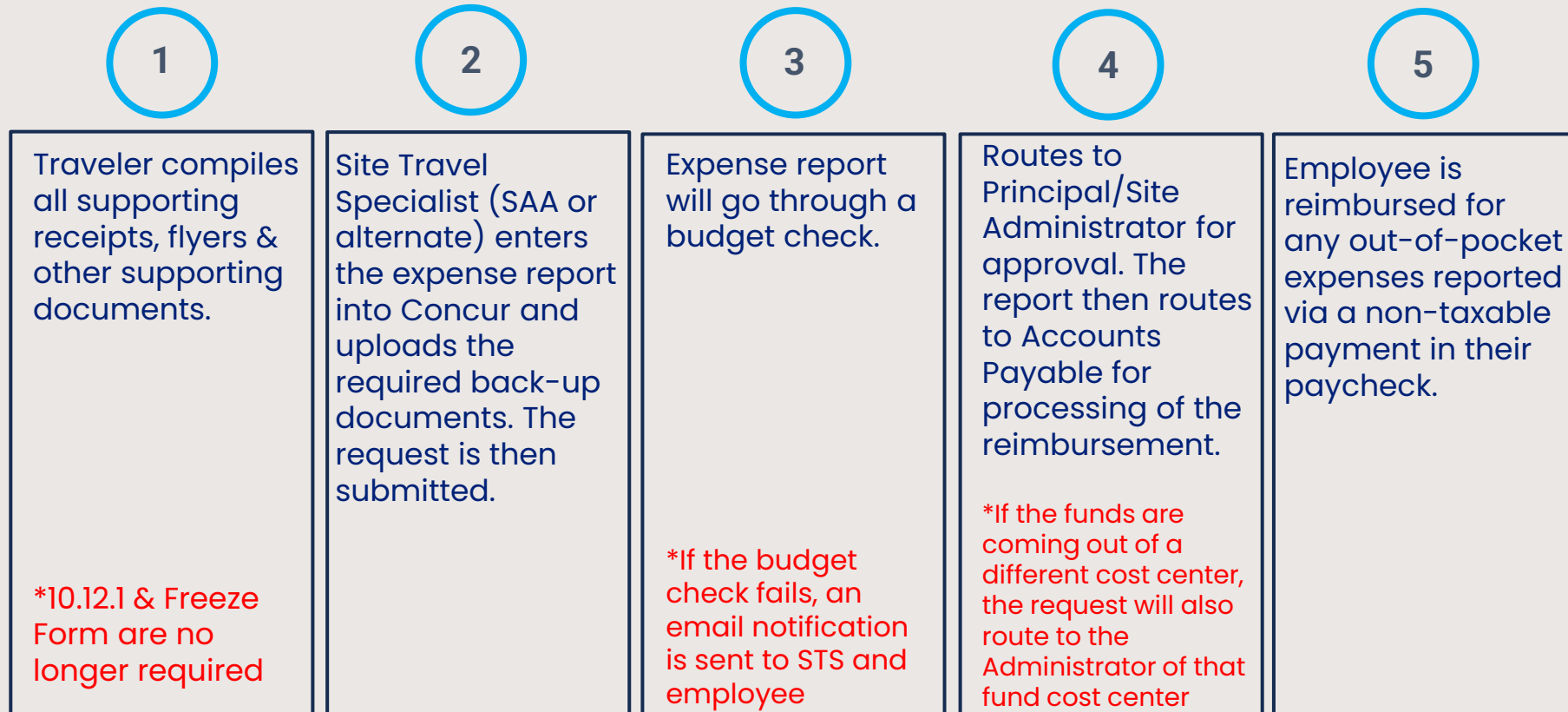
Your P-Card will decline if you do not contact the P-Card Unit
- Hotels can only be booked using P-Card through third-party booking sites (e.g. Expedia, Travelocity, Booking.com). Travelers are responsible for any incidental room charges and must provide their personal credit/debit card at check in



What to do after the event?

- Complete the Expense Report in Concur
- Upload a PDF copy of the Conference/Event Flyer
- If there were any travel expenses, upload the receipt/invoice. (hotel, airfare, conference fee, car rental & car rental gasoline, taxi/uber/lyft). Receipt must show last 4 digits of credit card #.
- The Concur expense request will route to the Site Administrator for approval of the actual expenses
- Accounts Payable will review and once approved, any reimbursements will be paid through payroll
- Even if there was no cost, an expense report is still required to close out the trip
- If the trip or the event is canceled, the request must also be canceled in Concur

Step-by-Step Overview for Expense Reports



Concur Travel Expense Checklist

This form is **NOT** required. It is a useful tool for Site Travel Specialist(STS) when entering Expense reports on behalf of an employee

Concur Expense Report Checklist

Los Angeles Unified School District

This form will be helpful to provide actual expenses to the STS to submit the required expense report after conference attendance/travel had been attended.

Receipt/Invoice must be attached to each expense type

Traveler Information

Date:

First Name: MI: Last Name:

Request Name (Name of event):

Travel Start Date: Travel End Date:

Employee ID #: Cost Center:

Actual Expense Information

☐ Conference Fee or Seminar/Course Fee: \$ ☐ Self-Paid ☐ District Prepaid

Vendor Name/Name of Conference:

☐ Air Ticket: \$ ☐ Self-Paid ☐ District Prepaid

Vendor Name (Airline):

☐ Baggage Fees: \$ ☐ Self-Paid ☐ District Prepaid

Vendor Name (Airline):

☐ Hotel: \$ ☐ Self-Paid ☐ District Prepaid

Location of the Hotel (City/State):

Vendor Name (Hotel Name):

PSD Travel Unit Contacts

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