This job aid summarizes the Concur expense policy exception approval requirements and associated workflow for travel and business expenses.

Concur Expense Policy Exception Approvals Requirements

Concur Expense Audit Rules have been configured to require Payee / Financial Approver justification or route reports to Senior Business Officers for specific policy exceptions as outlined in the table below.

Justification required by Payee and Financial Approval	Justification required by Payee Senior Business Officer Approval Required
• Use of Actuals and Per Diem on the same expense report • Appreciation given for lodging in private home in excess of $100 • Travel beyond min days required for trip – for Personal reasons • Clothing rental • Expenses with Miscellaneous Expense Type • Business class air travel, if under 5 hours • First class air travel • First class rail travel • Lodging > $350 threshold domestically, $400 internationally • Meals and Travel requiring Spouse / Partner • Purchase of supplies, books, equipment exceeding $500 • Missing receipts for expenses greater than or equal to $50. Air, Hotel, and Car Rental require original receipts • Reimbursement of expenses submitted in excess of 120 days • Fly America Policy Exception	• Meals over thresholds • Lodging over $525 domestic, $600 international • Entertainment expense is greater than $1,500 or the per person cost is greater than $75 • Business performance or de minimis gifts to employees exceeding $100 • Years of Service or Retirement Gift to employees exceeding $400 • Gifts to non-employees exceeding $600

Expense Reports submitted through Concur which contain exceptions that by policy require Senior Business Officer Approval and are not covered by existing audit rules, require the Supervisor / Initial Reviewer or Financial Approver to manually insert the Senior Business Officer as an Ad Hoc approver.

Getting Help

Please contact the Finance Service Center:
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now:
https://columbia.service-now.com