Concur Processor Agreement

The Business Affairs Office (BAO) offers travel delegates the ability to earn permissions to process (invoice) Concur travel Expense reports for UO Employee Domestic Travel for an assigned group.

Qualifications:

- Determine Group Name, complete Concur Processor Agreement intake sheet at forms.uoregon.edu
- Provide list of employees and 95 IDs to be assigned to your group.
- Attend UO Travel Policy/Concur Overview class (waived if attended within the last 12 months)
- Complete at least 24 Concur Expense reports with 80% accuracy
- Attend at least four Roundtable meetings annually (held last Wednesday of each month 11a – noon at BAO)
- Participate in minimum of one phone processor workgroup check-ins per month (held twice weekly – Wednesday and Friday at 9am)
- Process at least six Concur reports per year.

Concur Processor Responsibilities:

The department head and Concur Processor are responsible to follow all IRS and UO travel policy, rules and regulations. The BAO Travel Office conducts regular transaction reviews of randomly selected completed Concur expense reports. Travelers may be requested to return overpayments identified in the review process. The Concur processor will be responsible to collect the overpayment. The sanctions process for noncompliance with UO travel policy is detailed at: http://ba.uoregon.edu/sites/ba/files/policy/tr01.pdf

Limitations

If a Concur Processor’s Expense Report activity declines to less than six transactions per year, the travel office may revoke Processor permissions. Processor permissions are granted for the user group for which the delegate serves as processor. Permissions for additional or new Concur groups may require the delegate to demonstrate proficiency by processing a set of reports before processor permissions are extended. When a delegate relinquishes processor permissions either voluntarily or involuntarily, requalification is required to have processor permission reinstated.

I agree to process and approve travel reimbursements according to the rules, regulations, and processes governing UO travel and described on the BAO travel website, UO Fiscal Policy Manual, IRS Publication 463. I will not share my Duckweb username and Personal Access Code with anyone.

Department Head Agreement: I agree to the responsibilities associated with the delegated authority to approve travel reimbursements in my department, and will uphold the rules, regulations and processes governing UO travel as described on the BAO travel website, UO Fiscal Policy Manual, and IRS Publication 463.

Jan 2020