

## ***MATERIALS DEPARTMENT CONCUR GUIDELINES***

The campus has adopted the Concur portal for the processing of all travel reimbursements [www.concursolutions.com](http://www.concursolutions.com).

Below are guidelines for travel reimbursement for all research travelers in the Materials Department.

### **Assigning a Preparer Delegate**

In order for the department to complete travel requests and expense reimbursements on your behalf you will need to assign a preparer delegate in Concur. **All personnel must assign a preparer delegate to receive reimbursement.** Due to recent staffing shortages, all personnel should assign Jennifer Thorndyke ([thorndyke@ucsb.edu](mailto:thorndyke@ucsb.edu)) or Emi Sautot ([emisautot@ucsb.edu](mailto:emisautot@ucsb.edu)) as their preparer delegate at this time. If/when you need to reassign your delegate to a new staff member you will receive guidance. You will find information on how to assign a delegate [here](#).

### **All travel Requires Pre-Approval**

This is a two-step process.

1. In order to ensure proper funding, PI approval, and funding availability, all research personnel must complete the [Materials Department Travel Approval Form](#) and return it to your Concur delegate (Jennifer Thorndyke or Emi Sautot) who will obtain the appropriate signatures on your behalf. This form must include funding information, please ensure you have discussed the funding source with your PI/advisor before submitting the form.

Additional information on travel policies can be found on the [Materials Travel Resource webpage](#). If you have questions please ask your delegate before making the travel arrangements.

2. Once the appropriate signatures have been obtained, your preparer delegate will submit a travel approval via Concur on your behalf. **Important new step:** Once this has been approved it will be routed back to you for final submission approval in Concur. Please make sure to complete this step or the approval will not be submitted. *Any approvals submitted without an assigned delegate will be returned to the submitter.*

## **After travel**

Submit or upload your receipts for your delegate to review. This must be done within 21 days of travel in order to stay within policy and to ensure timely reimbursement.

Your delegate will complete/review the expenses and obtain appropriate Departmental approvals.

**Important New Step:** Once your delegate has completed your expenditure reimbursement request, you will receive an email to submit the request. Please review the expense before submitting to ensure that it is correct. If this step is skipped reimbursement will not be processed or received. *Submissions without delegate review will be returned.*

If you have any questions, please reach out to Jennifer Thorndyke (thorndyke@ucsb.edu) or Dawn Holden (dholden@ucsb.edu).

**Note:** *These guidelines are only for travel on Materials Department funds. Travelers utilizing funding in another Department (SSLE, MRL, CNSI, etc.) should consult the funding department's administrative staff or website prior to submitting a travel approval for Department Specific guidelines.*