



Good morning everyone!

[Concur](#) has now been live for a few weeks and we wanted to reach out to provide some reminders and guidance. As you all know Concur launched on February 1st and is the new system we are using to process reimbursements for travel expenses, business meeting/entertainment expenses, membership fees, and miscellaneous supplies expenses.

If you are not a UCSB employee and you have a reimbursement request you will need to submit your reimbursement paperwork to [cao-reimbursements@ece.ucsb.edu](mailto:cao-reimbursements@ece.ucsb.edu). We will process your reimbursement in Concur on your behalf.

If you are a current employee that is paid through UCPATH you can access Concur by logging in with your UCSB NetID email address. When you log in to Concur for the first time you will need to [set up your Preparer Delegate\(s\)](#). As a reminder, your Preparer Delegate is the person or persons who you submitted any of your reimbursement requests for processing prior to Concur going live. If the CAO is your support office please assign **both** myself (Olivia La Pierre) and Nikole Vyn as your Preparer Delegates. Please note that when you search for your Preparer Delegate you must search for their name (not their email or title).

**IMPORTANT:** If you have not already done so, please also verify your email in your Concur Profile Settings to ensure that you receive any emails from Concur about your reimbursements. To do this go to your Concur Profile Settings and select "Email addresses" from the left-hand bar under the "Your Information" section. You can then add and verify your email. When your email is verified you should go to the "Request preferences" and "Expense preferences" sections in the left-hand bar to make sure the top two checkboxes are checked in order for you to receive emails.

Please visit the [Concur Knowledge Portal](#) to watch informational videos regarding how to get started with Concur and create expense reports (note that you will generally need to make a new "Report" not a new "Request"). After you have created an expense report in Concur, please email your Preparer Delegate(s) with your reimbursement worksheet and all of your reimbursement documentation, as a complete packet, and let them know your report is ready for review in Concur (email [cao-reimbursements@ece.ucsb.edu](mailto:cao-reimbursements@ece.ucsb.edu) if the CAO is your support office). Also, note that the Preparer Delegates are your resource for support when you need assistance preparing an expense report in Concur; and minimally, all reimbursements processed in ECE will need to be reviewed by a Preparer Delegate before you submit it. If you submit a reimbursement in Concur that has not been reviewed by a Preparer Delegate it will be sent back to you with a reminder to coordinate a review with your Preparer Delegate.

As a reminder, all UC reimbursement policies have stayed the same so any reimbursement documentation that was needed before the Concur launch will still be required. If you have any questions please feel free to email the CAO.

Best regards  
CAO

2/22/2022

