Local Transportation

Local Transportation is classified as an expense for local ground transportation such as taxi, Uber, Lyft, shuttle, bus, subway, etc. Note that Local Transportation expenses are only allowable for business travel. Travel expenses incurred for personal events or personal meals are not allowable. Please use this guide to appropriately expense Local Transportation.

Accessing Concur

1. Go to Travel.ou.edu and login with your 4x4 or username.
2. Click Expense from the main menu and either select + Create New Report or access an open report by clicking on the report name.
3. For more information on how to complete the report header, see the Report Header job aid.

Travel Card Charges

4. To expense a Travel Card charge, select Add Expense.

5. The available card charges will appear under the Available Expenses tab in the pop-up window.
6. Click the box to the left of the transaction and click Add To Report to pull the charge over to the expense report.
Local Transportation

7. Click on the transaction.
8. If the transaction does not default to the correct expense type, use the drop-down menu under Expense Type to select Local Transportation.
9. Ensure that the Traveler Type, Trip Type, Report/Trip Purpose, Event Name/Nature of Business and City fields all fill down appropriately from the report header as these are required entries.
10. Enter in the amount of the fare, including any additional surcharges imposed by the vendor, in the Fare field.
11. Enter in the amount of the tip in the Tip field. Please note that OU Policy limits tips to a maximum of 20% of the fare unless the fare is less than $5 and then a $1 tip is allowable. If the tip amount paid is greater than allowable, the overage amount must be entered as Personal/Non Reimbursable. See the section below for information on how to enter the overage amount.
12. Enter in the valid business travel locations in the To/From field. Example: Hotel/Airport.
13. Additional information may also be entered in the available fields.

Personal/Non-Reimbursable

14. If the Tip amount is greater than 20% on a Travel Card charge, an alert will appear noting that the overage amount must be coded as Personal/Non-Reimbursable.
15. Click Itemizations at the top of the expense.

16. On the Itemizations tab, click Create Itemization.
17. The Expense Type drop-down will appear and Local Transportation should be selected.
18. When Local Transportation is itemized, only the allowable amount of Fare and Tip should be added to the Amount field.
19. Click Save Itemization but note that the expense needs to be itemized further.
20. Concur will display the remaining amount to Itemize.

21. Click Create Itemization again, select the Personal/Non-Reimbursable expense type from the drop-down menu and fill in the required fields.
22. Click **Save Itemization** again and ensure that there is no remaining amount to be itemized.

![Image of itemization process]

**Cash/Out of Pocket Charges**

23. To expense a Cash/Out of Pocket charge, click **Add Expense**.

![Image of Add Expense window]

24. Select the **+ Create New Expense** tab in the pop-up window.

![Image of adding new expense]

25. Either type in **Local Transportation** in the **Expense Type** search bar or scroll though the list of expense types and select **Local Transportation**.
Local Transportation

26. Enter in the Transaction Date by using the calendar option or type in the date using the format of MM/DD/YYYY. The date used should be the transaction date noted on the receipt.

27. Enter the city of purchase in the City field.

28. Enter in the amount of the fare, including any additional surcharges imposed by the vendor, in the Fare field.

29. Enter in the amount of the tip in the Tip field. Please note that OU Policy limits tips to a maximum of 20% of the fare unless the fare is less than $5 and then a $1 tip is allowable. If the tip amount paid is greater than allowable, only the allowable portion of the tip amount paid can be reimbursed. Please reduce the tip amount to the allowable limit.

30. Enter in the valid business travel locations in the To/From field. Example: Hotel/Airport.

31. Change the Payment Type to Cash/Out of Pocket.

32. Enter the amount in the Amount field. Note that the amount will default to US Dollars (USD). Do not enter in commas or dollar signs in this field.

Receipts

33. Charges for Local Transportation in excess of $25.00 will require a receipt. To satisfy the receipt requirement if the vendor did not provide an e-Receipt, this is a Cash/Out of Pocket expense or there is a more detailed receipt to add to the expense line, add the receipt by selecting Attach Receipt Image to the right of the expense. Note that if the receipt field is not present, click on the Show Receipt hyperlink at the top right of the screen.

34. A pop-up box will appear and you can click Upload Receipt Image to locate the receipt saved on a local device or, if the receipt image was uploaded previously, the receipt will be available to select.
35. Click on the correct receipt and click Attach.
36. The receipt image will appear to the right of the screen. Click Save Expense at the top right or bottom left of the screen.

Additional Information
37. Please note that if Local Transportation expenses in excess of the tipping maximum are submitted on an expense report without reducing the tip amount appropriately, the expense report will be returned for correction. When an expense report is returned, all approvals for the expense report must be obtained again.