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.
2. Click Expense from the main menu and either select + Create New Report or access an open report by clicking on the report name.

Travel Card Charges
3. To expense a Travel Card charge, select Import Expenses and the available card charges will appear on the right side of the screen.
4. Click the box to the left of the transaction and click Move to pull the charge over to the expense report or click on the charge and drag it to the expense report on the left side of the screen.
5. If the transaction does not default to the correct expense type, use the drop-down menu under Expense Type to select Local Transportation.
6. 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.
7. Enter in the amount of the fare, including any additional surcharges imposed by the vendor, in the Fare field.
8. Enter in the amount of the tip in the Tip field. Please note that OU Policy limits tips to a maximum of 15% 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.
9. Enter in the valid business travel locations in the To/From field. Example: Hotel/Airport.
10. Additional information may also be entered in the available fields.

Personal/Non Reimbursable
Quick Reference Guide: Local Transportation

11. If the Tip amount is greater than 15% on a Travel Card charge, an exception will appear noting that the overage amount must be coded as Personal/Non Reimbursable.

12. Click Itemize at the bottom right of the screen.

13. The Expense Type drop-down will appear and Local Transportation should be selected.

14. When Local Transportation is itemized, only the allowable amount of Fare and Tip should be added to the Amount field.

15. Click Save but note that the expense needs to be itemized further.

16. Click on the main expense line for Local Transportation from the left side of the screen and then click Add Itemization at the bottom right of the screen.

17. The Expense Type drop-down will appear and Personal/Non Reimbursable should be selected.

18. Enter in the overage amount in the Amount field and click Save. Note that the remaining amount to be itemized should be listed in red in the Remaining section at the top right of the screen.

19. Cash/Out of Pocket Charges

20. To expense a Cash/Out of Pocket charge, click on + New Expense at the top of the screen.

21. Either type in Local Transportation in the Expense Type search bar at the top right of the expense report or scroll through the list of All Expense Types at the bottom right of the expense report and select Local Transportation.
22. 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.

23. Enter the city of purchase in the **City** field.

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

25. Enter in the amount of the tip in the **Tip** field. Please note that OU Policy limits tips to a maximum of 15% 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.

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

27. Change the **Payment Type** to **Cash/Out of Pocket**. Please note that **Pending Card Transactions** should not be expensed until the transaction has posted. Please see the above section on **Travel Card Charges** for more information.

28. 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.

**Fare and Tip Amounts Split**

29. Some merchants may charge the fare amount and the tip amount as two separate transactions.

30. In this example the fare was charged as one Travel Card transaction for $78.11 and the tip was charged as a second transaction for $12.44. The tip maximum is $11.72 and the remaining amount of $0.72 is not allowable.
31. In this case, the first transaction for the fare should reflect the fare amount only with a $0 tip.

32. The second transaction for the tip should be entered in the fare portion with a $0 tip, but reflect the allowable tip amount only. If the tip amount is greater than allowable, the tip transaction will need to include an itemization for **Personal/Non Reimbursable** for the overage portion and an itemization for **Local Transportation** for the allowable portion of the tip.

**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**.

34. A pop-up box will appear and you can click **Browse** to locate the receipt saved on a local device or, if the receipt image was uploaded previously, the receipt will be available in **Available Receipts**. Locate the correct receipt and select **Attach**.

35. Once the receipt requirement has been added, the icon will show a blue check box indicating that the receipt requirement has been met.

36. Click **Save**.

**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.