Quick Reference Guide: Registration

Registration is classified as the fee charged to attend a conference, workshop, seminar, meeting or other similar activity. When the sponsoring organization requires pre-registration and pre-payment, one of the following two options must be satisfied for payment on the Travel Card to be allowable. (1) The sponsoring organization will not accept a Purchase Order in lieu of advance payment. Documentation to this effect in writing from the sponsoring organization should be attached to the expense report. (2) The sponsoring organization will accept a Purchase Order in lieu of advanced payment. However, a discounted fee is offered if the registration is paid in advance. To qualify for this option, the registration fee must (a) result in a discount to OU, (b) allow for substitution of participant and (c) provide a 100% refund should the event be cancelled. Documentation to this effect in writing from the sponsoring organization should be attached to the expense report. Please use this guide to appropriately expense Registration.

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 Registration.
6. Ensure that the Traveler Type, Trip Type, Report/Trip Purpose and Event Name/Nature of Business fields all fill down appropriately from the report header as these are required entries.
7. Additional information may also be entered in the available fields.
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Cash/Out of Pocket Charges

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

9. Either type in **Registration** 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 **Registration**.

10. 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.

11. 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.

12. 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

13. All charges for **Registration** 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**.

14. 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**.

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

16. Click **Save**.