Patton College of Education Resource Guide

This resource guide is intended to provide general guidance on frequently asked questions. All faculty, staff, and administrators are to have a general understanding of processes used in The Patton College of Education. It is important to note that each PCOE department operates under specific policies and procedures; this document does not supplant department policies and/or procedures.

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GENERAL INFORMATION

The Patton College of Education has five departments

1. Counseling and Higher Education
2. Educational Studies (graduate only)
3. Human and Consumer Sciences
4. Recreation and Sport Pedagogy
5. Teacher Education

Contact information for The Patton College faculty, staff, and administrators can be found here: (https://www.ohio.edu/education/faculty-and-staff/index.cfm)

What are Centers?
The Patton College has 9 centers.

1. Center for Higher Education (Counseling & Higher Education)
2. George E. Hill Center for Counseling and Research (Counseling & Higher Education)
3. Center for Partnerships (Teacher Education)
4. Child Development Center
5. Ohio Center for Equity in Mathematics and Sciences (Teacher Education)
6. The Stevens Literacy Center (Teacher Education)
7. Curriculum and Technology Center (Dean’s Office)
8. College Bound (Student Affairs)
9. Institute for Democracy in Education (Educational Studies)

Each center has a different mission. More information about centers can be found on the PCOE website.

What are Group I, II, III, and IV faculty?
Group I faculty are tenure track or tenured faculty. Group I faculty are designated as assistant professors, associate professors, or professors.

Group II faculty are teaching track faculty. Group II faculty are lecturers, associate lecturers, or senior lecturers.

Group III faculty are hired per semester and may sometimes be referred to as adjunct faculty.

Group IV faculty are visiting professors on a 3-year contract.

What is my PID number?
All Ohio University employees have a Personal Identification number (PID). Upon hire, all employees should go to the Bobcat Depot located on the bottom floor of Baker Center to obtain their OHIO ID. The PID is located on the ID card.

What do I do I lose my ID card?
Obtain another one at Bobcat Depot on the lower floor of Baker Center; Fees will apply.
**Who do I contact with a maintenance issue that needs attention?**

Maintenance issues should be directed to the administrative specialist in your department. They will place a work order with facilities for you. All larger maintenance issues should be reported to Mary Starcher (593-9449) for proper channeling.

If it is an emergency call 740-593-2911 and notify Mary Starcher.

**I need to schedule a meeting room. What rooms are available and how do I reserve one?**

Lindley Hall has three rooms that can be reserved for meetings. Both Lindley 162 and Lindley 048 (known as the Dean’s Conference Room) are equipped with a conference phone and computer monitor. Lindley 162 is the small conference room that holds 6 people and Lindley 048 is the large conference room that can hold 12 people comfortably. Lindley 321 is the auditorium and it can hold approximately 60 people. To book any of these rooms please follow the instructions below. If a meeting room is needed in Tupper (or anywhere else on campus) an email request should be sent to Jen Martin at martinj8@ohio.edu.

You can request a room to hold a PCOE meeting or event one of two ways. The Department Administrative Specialist can send a meeting request on your behalf to schedule a room. Alternatively, you can schedule a room by following these instructions.

Reserving a room via Microsoft Outlook:
1. Open your calendar (or the calendar of the person you are scheduling for)
2. Select the time block you wish to set up you meeting
3. In the subject area type in the name of your event/meeting
4. From the tool bar on top select “Scheduling Assistant”
5. In the next box click on “Add Rooms” (bottom left corner)
6. In the search box type “Lindley Hall” and select the room you wish to request
7. Click “ok”
8. Double check your date and time, then hit “send”

This will send an email request to the Dean’s Office for approval. You will then get an email response of your approved or declined request. The only way your request would be declined is if the room you are trying to reserve is already booked.

**How do I reserve the college van(s)?**

To reserve a college van send an email to Mary Starcher at starchem@ohio.edu. Please arrive a few minutes early on the day you need the van’s keys, then read and sign the van policy.

**How do I locate the contact information of someone at Ohio University?**

You must first go to Ohio University’s home page (www.ohio.edu). Located at the very top right corner there is a box that reads “Ohio.edu” with a pull down arrow. Click on the pull down arrow. In the drop down box “people” will appear. Select “people” and then type the person’s name, starting with last name first followed by a comma then their first name. Example: Doe, John. Alternatively, you can search specific office names by selecting “Ohio.edu”

**Where can I park my vehicle?**

You should call, visit, or email parking services to check options that work best for you. Ohio University Parking Services www.ohio.edu/parking
**How can I arrange a temporary parking permit for a guest of the college?**
At least a week in advance contact your Administrative Specialist and they will send a request to Parking Services. Allow a few extra days if the parking permit needs to be mailed.

**What assistance is available to me at Alden Library?**
The Patton College has a specific Support Librarian, Chris Guder (740-597-1975), Alden Library 206

**If I have a problem with a colleague or student whom should I turn to for help?**
Faculty should follow the chain of command, beginning with the program coordinator when possible. If a situation arises that you do not comfortable with, you should talk to your department chairperson. In an emergency call OUPD at 593-2911 and report it to the Dean’s Office as soon as possible.

Faculty can complete a formal disposition assessment on a student. This alerts the Office of Student Affairs about the concern and initiates a formal review process conducted by the Credential Review and Candidate Progress Board to ensure due process. If you intend to submit a disposition assessment, please contact Assistant Dean Coon in Student Affairs for the appropriate form.

There is also an Ohio University Code of Conduct. The Ohio University’s Office of Community Standards & Student Responsibility [https://www.ohio.edu/communitystandards/](https://www.ohio.edu/communitystandards/) will be consulted if a student’s conduct seems problematic.

**How do I turn in grades?**
Several weeks prior to the end of the semester you will receive an email from the registrar indicating that you can go into the Faculty and Advising Center. Only faculty should submit grades including special grade requests.

**What is an “I” and a “PR”?**
“$I$” = incomplete – This grade turns into an F, after six weeks.
“$PR$” = Progress – grade changes form

**What is a green slip?**
A green slip is a class permission slip that allows a student to register for a course they could otherwise not register. Students may seek a green slip if they do not meet the minimum prerequisites, if permission to register is required, if the class has exceeded its maximum enrollment, as well as other reasons. Faculty need to complete and sign the green slip and students then take the slip to the registrar’s office located in Chubb Hall.

**What is “Turn-it-In”?**
Turn-it-In is a built-in element in Blackboard that can check theses and dissertations for plagiarism. If used through Blackboard, this is a free service to any OHIO faculty or student.
What is OneDrive and how do I access it?
Ohio University’s secure cloud storage utilizes OneDrive. Use OneDrive to share files and collaborate with multiple individuals across campus or elsewhere. Access is enabled/disabled automatically based on your status as a current student, employee, or emeriti. Click here to login your OneDrive: https://onedrive.ohio.edu.

Who can help me with grants?
Chip Rice 597-9007, 178N Lindley Hall is the Patton College’s Research Grant Development Coordinator. Faculty should work with Chip as they seek grant opportunities.

Following a grant award, Jennifer Martin (teacher Education) 593-4424, 122S Lindley Hall can assist in the grant management.

GENERAL DEPARTMENT INFORMATION

How do I know when my program and/or department meetings are scheduled?
Each program and department holds regular meetings. Meeting times and locations can be found on The Patton College calendar (https://calendar.ohio.edu/site/education). Typically meeting information is also sent via email. Departmental administrative specialists may place the meeting times on your calendar.

How do I pay for a conference?
Check with your department chair.

Do I need to hold office hours?
Yes. Full time faculty members are required to have formal office hours scheduled and communicated to students. Faculty should check with their department chair on specific requirements.

Where do I find my syllabus? If I have to create one, are there specific things that must be included? Is there a master syllabus?
Each department should have a file of all approved syllabi. Departmental syllabi are also located on the Patton College shared drive. (See below for directions for accessing shared drive.) If the syllabus is not there, contact the Department Chair.

If a syllabus needs to be created, there are specific items that must be included (e.g., contact information, evaluation criteria, disability statement, national/state accreditation standards). To ensure consistency, contact your department chair for guidance.

Can I make changes in my courses or do I need to seek approval?
Any substantial change in a course needs to obtain department, college, and university approval. Course changes or new course approvals are submitted in OCEAN (OHIO Curriculum
Enhancement and Approval Network). Information about course guidelines can be located on the Individual Course Committee guidelines
https://www.ohio.edu/facultysenate/committees/ucc/icc.cfm

Course requirements that have required accreditation assessments cannot be changed without the approval of the program coordinator on the Athens campus.

**What textbook do I need?**
Textbook information should be listed on all course syllabi. If you are unsure of what textbook you should use, please contact your program coordinator and/or department chair. If it is a new class or if you have the option of selecting a new textbook you can obtain a desk copy of the book to review prior to selecting that text.

**How can I see my course in course offerings and find where the course is taking place?**
All OHIO course offerings are located on the University Registrar page (www.ohio.edu/registrar).
https://webapps.ohio.edu/classes/search.htm Once a course is selected, click the arrow to the left of the course number for additional course information (e.g., course description, class location).

**How do I find my class list?**
The Ohio University Faculty and Advising Center is available from the University Registrar website. Faculty must use their OHIO login information to access the system. Select the Teaching dropdown menu and select the term and course. Click on the icon next to the magnifying glass of the people to see the class list.

**What do I do if I have to cancel class?**
If you need to cancel class, you should notify your students via email. All student emails are located on your class list in the Faculty and Advising Center. If it is a last minute cancellation, you may also notify your administrative specialist and ask to have someone post a sign on the classroom door.

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**CLASSROOM/OFFICE LOGISTICS AND SUPPLIES**

**How do I get materials for my office or class?**
Each department has a supply closet. Faculty members should contact their administrative specialist for access. Certain requests may need to be purchased in Bobcat Buy, which requires approval by the department chair. Special orders should be placed no later than one month prior to the time it is needed.

General office supplies are provided to you. Anything beyond this you should send an email inquiry to your department Administrative Specialist for guidance on these policies.
Where should I keep my supplies?
Faculty should store their supplies in their own office. Some specific classes have designated closets but those supplies are for specific materials associated with specific courses and should not be used for personal supplies.

How do I make copies?
Each department has a department-specific copier that is available during regular business hours. Group III faculty will need to work with their department chair to obtain a key to the copier room.

Mary Starcher assigns a copy code and has the master list. Mary can be reached at starcher@ohio.edu or 593.9449. You will need to have your PID number and your department name. If there is a large amount needed or color copies, it is recommended to use Ohio University’s Printing Services. Questions about making copies should be directed to your administrative specialist. Problems with a copier should be directed to Mary Starcher.

What is Live Text?
Live Text is the PCOE’s data management system for all accreditation related data. Contact The Patton College Director of Assessment and Academic Improvement, Wendy Adams (adamsw1@ohio.edu) to receive information on setting up your account.

Who do I contact with questions about LiveText?
Beth Backes can assist in answering LiveText questions that pertain specifically to edTPA. If there are questions about how to get your course listed, and how the students obtain access to LiveText, those questions should be directed to Wendy Adams.

Faculty and students can also view video tutorials by logging into their account and clicking on the ‘Help’ tab or by contacting support@livetext.com

Do I have to use Blackboard?
Blackboard is a learning management system for online storage and presentation of courses and materials. It is not required that you use Blackboard, however, unless you are using LiveText it is recommended that you have students turn in assignments through Blackboard, and that you do your grading in the grade center for easier record-keeping and management.

Who do I contact with questions about Blackboard?
For in-house assistance with Blackboard, staff in the Curriculum Technology Center can help answer questions, troubleshoot, design, and prepare courses in Blackboard. The Curriculum Technology Staff also offer semester Blackboard workshops, as well as one-on-one sessions. Please contact Beth Backes to inquire about the above options.

You can also view video tutorials on frequently asked questions regarding Blackboard on the "Faculty Resource Page" on our website.
You may also call OIT Help Desk after hours for immediate Blackboard assistance. They can be reached at 740.593.1222.

**What is the Master Curriculum File?**
The Ohio University Master Curriculum File (MCF) is maintained by the University registrar and includes every approved course in the university. [https://www.ohio.edu/registrar/mcf.cfm](https://www.ohio.edu/registrar/mcf.cfm)

**What is the UCC approval process?**
The University Curriculum Council (UCC) is the final recommending voice in all curricular matters. [https://www.ohio.edu/facultysenate/committees/ucc/index.cfm](https://www.ohio.edu/facultysenate/committees/ucc/index.cfm)

UCC has several subcommittees:
- Individual Course Committee (ICC) reviews and approves all new course and course changes.
- Programs Committee (PC) reviews any new programs or substantive program changes.

Review process:
- In OCEAN, faculty person initiates a new course/program or requests a change to a course/program and completes the necessary documentation.
- After submission, the document goes to the Department Chair for review/approval.
- After approval, the document goes to the Patton College Undergraduate or Graduate Committee.
- After approval, the document goes to the Patton College Dean’s Office.
- After approval, the document goes to either ICC or PC.
- After approval from ICC- the course is presented to UCC for one reading. After approval from PC- the program is presented to UCC for two readings.

- Program Review Committee oversees the university academic program review of all units across the university.

**What is OCEAN?**
OCEAN (OHIO Curriculum Enhancement and Approval Network) is the university system for submission, review, and approval of all courses and programs.

**How will my courses be evaluated?**
All Patton College course evaluations are done electronically. Near the end of the semester you will receive notification and an email will be sent to students asking them to complete an evaluation of your course(s). You will be asked to remind students to complete their evaluation. Course evaluation data is sent to you following the term.

**What Ohio University buildings are open during an academic break?**
All university buildings are locked during the winter break (December 25-January 1). Otherwise, most buildings are open during breaks. After you get your OU ID card you will be able to enter Lindley Hall after hours and on weekends. You must enter the building using the “swipe” entrance at the top of the ramp in front of the building. To gain swipe access you will need to provide Mary the PID number and the department.
**How do I get into the building after hours and on weekends?**

If a class takes place in the evening or on a weekend, the registrar’s office should be notified prior to the commencement of the class to ensure the room is unlocked.

Exterior Building Access – Facilities are responsible for the routine unlocking and locking of exterior building doors during the business week. OUPD performs this function on weekends based on event scheduling information provided by the Office of the University Registrar. Facilities and OUPD are not responsible for the unlocking of interior classroom doors.

Interior Classroom Doors – Departments are responsible for insuring their instructors and staff have access to the common classroom key. Normally, all university classrooms should be unlocked. However, we know that instructors do encounter locked classroom doors when a prior instructor or student locks the classroom after exiting.

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**STUDENT INFORMATION**

**What does the Office of Student Affairs do?**

Student Affairs assists students with academic advising, career exploration, and declaring majors, minors and certificates; as well as GPA assistance, transient/transfer credit approval, course substitutions and general college and university inquires.

**What is a DARS report?**

DARS stands for Degree Audit Reporting System. A student’s DARS report shows all of the requirements necessary for graduation. Questions regarding DARS should be directed to the Student Affairs Office.

**TECHNOLOGY**

**Who should I contact if I have a computer issue?**

The Patton College OIT department encourages you to go online to https://support.oit.ohio.edu/ and fill out a “footprints ticket” so your work order may be easily tracked. If it is something that needs immediate attention then start by calling Don Weekley and follow the list below:

- **Curriculum Technology Center Front Desk:** 593-4451
  - Equipment rentals, conference room setup or computer lab reservations
- **Don Weekley:** 593-4450
  - Computer, technology, equipment, and classroom tech support.
- **Lisa Dael:** 593-9925
  - Online programs coordination (inquiries, application & registration), and course evaluations.
- **Beth Backes:** 593-2288
  - Lab operations, technology & equipment, Blackboard/online course assistance, website, and social media.
What resources are available to me in the CTC (Curriculum, Technology Center)?

Rental Equipment
- Projectors
- Video and digital cameras
- PowerPoint clickers
- Camera tripods
- Laptops & iPads
- Webcams and omni-directional microphones

Computer Lab, Laptop & iPad cart for classes
- Web conferencing assistance (webcam setup) for Skype, Adobe Connect, conference calls, etc.

Technology workshops and trainings
- Blackboard
- Qualtrics
- Social media
- Educational Apps
- Adobe Connect

Online course preparation and consultations

How do I access shared drives, manuals, etc.?
You can view a PDF with instructions for this on the “Faculty Resource Page” on our website.

Do I need to use Outlook the calendar? How does it sync to my phone?
Ohio University and The Patton College regularly use Outlook calendar to send meeting invitations. It is strongly encouraged that you keep your schedule up to date. The Ohio University Bobcat Depot can assist you in syncing your emails/calendar/memos to your smart phone.

How do I create meetings? How do I see others’ schedules?
To see someone else’s calendar, click "Open Calendar" and find the person or room in the directory whose calendar you wish to view. (NOTE: it will only show boxes of time marked as "Busy”. It will not show you their meeting details unless you have been given permission to do so.)

What is “Clutter” in my email?
The "CLUTTER" folder is for email that the server has determined that, though legitimate, is of little or no value to you based on your email reading habits. Think of this as someone sorting out the magazines and newsletters that you only read once in a while or not at all anymore and have not yet unsubscribed from them or just keep getting them anyway even though you are no longer interested in them. If you want to start or would rather see something from the "CLUTTER" folder, simply move it to your "INBOX" and the server will learn that you actually want to see/read this particular type of email more often.
Something to keep in mind is to check both of these folders once in a while in case something you want is misfiled. They do help keep your inbox cleaner, but they are not perfect.
PURCHASING/BUDGET/CONCUR

Do I need a P-Card?
Yes, if you plan on doing any traveling or purchasing things for OU business. Only Group I and II faculty are eligible for P-card. Special circumstances should be discussed with your department chair.

How do I obtain a P-Card? What if I lose my P-card?
There is an application on-line that you fill out and submit to your department chair – you can go to the following website or seek assistance from your department support staff
https://www ohio edu/finance/procuretopay/upload/Purchasing-Credit-Card-Application.pdf

What am I allowed to purchase using a P-Card?
An explanation of all allowable purchases as well as the necessary documentation can be found by clicking on the Buying Guidelines link from the OHIO Procurement Services website: https://www ohio edu/finance/procuretopay/procurement/

You may not ship anything purchased with any Ohio University funds (including RI, Start-up, Professional Development, Foundation and Grants) to a personal (or home) address. Everything shipped, must be shipped to an Ohio University address.

You may not purchase supplies for personally owned equipment. The Ohio ethical interpretation for this regulation is that there is no way to insure that everything purchased for such equipment is totally used for Ohio University business. For example, copy paper and printer ink in your home can be used for things other than OU business.

You may not purchase gas for your personal vehicle with OU funds. Even though you may be on a business trip at the time, you can reimburse mileage, but you cannot purchase a tank of gas. This does not include rental vehicles. It is only regarding your personal vehicle.

Do I need training to use a P-Card?
Following the obtainment of P-card, people must enter their financial transactions into Concur. Specific training on Concur is available through Human Resources. It is important to note that all faculty, staff, and administrators are responsible for timely submissions of Concur reports.

OHIO employees, with the exception of students have access to Concur regardless of whether they have a P-card. This is because personal reimbursements must be processed through Concur.

I need help with Concur.
A step-by-step guide has been developed to walk you through the Concur report process. See Appendix A
How soon after a purchase do I need to complete my Concur?
P-card purchases generally need to be resolved in Concur within 15 days of purchase. P-cards will be suspended if Concur reporting is not completed within a specified timeframe. Faculty/staff should attend to emails indicating that reports should be filed in Concur.

Can I identify someone to do my Concur reporting for me?
Faculty and staff are required to complete their own Concur reporting. It is important for faculty and staff to be held accountable for all university expenses and documentation for reimbursement. Ohio University offers regular Concur training and has training resources online. Department administrative specialists can provide assistance however, faculty are responsible for actually completing their Concur reports in a timely manner. In brief, prior to completing a report, faculty/staff should have the following ready: account number, explanation/rationale for the expenses and all accompanying receipts.
Appendix A
CONCUR Step-by-Step Guide

Step 1: After you have made a transaction with your purchasing card you will receive an email notification. Click the link in the email to take you to concur. Sign in.

This is the screen you should see when you log into concur. If you have an expense it will appear in two places. One is near the top where it says 00 Available Expenses and one is in the middle of the page where it says Available expenses.

Step 2: Click on the top of the page where it says available expenses and that will open it up to a different page that looks like this: (please see next page).
**Step 3:** There is a small clickable box next to your expenses. Click the expenses that go together (most likely from the same event or trip). Once the box is clicked move to the right side of the screen and click the box that says “move”. It will give you a drop down and the option to move it to a new report.

**Step 4:** Once you click the charge to move it to a new report it will take you to the next window where you will “Create a New Expense Report.”
This box is where you start the actual report. This is where people usually get tripped up. Here are some helpful hints.

**TRAVEL REPORTS:**
The report name has to be very specific or finance will send it back.

- If you are traveling to a conference and the expense report you are trying to complete is for something relating to that travel (ie. Hotel, flight, rental car, airport parking, etc.) then the report should be **TR(first 4 letters of your last name)(first date of travel)**. An example would look like this: TRLAND06032016.
  - Mental note, If there are going to be multiple reports for the same trip, you need to put a letter at the end of you header name. TRLAND06032016A
    - This will help lump the reports together on the finance side. An example of this would be, if three months before your conference you book your hotel, conference registration, flight, etc, and do that report once the transactions have hit concur, then you would put an A at the end of your report. After the travel occurs and you have more charges for that trip (baggage fee, parking, transportation, per diem, etc), that will be the same header with the next letter at the end. TRLAND06032016B
- The start and end should be the first and last day you travel.
- The business purpose is self-explanatory, what is the need for the transaction? If this is for professional development then say that. Professional Development: Conference
  - You can add additional details about the Conference in the comment box if needed.
- The account string is specific for what you are doing. If you need an account number please let me know. Also, the account number gets entered backwards in concur from the way it’s written. If you are using the professional development number (010-0006-07111-UN0700517) then it’s entered backwards in concur. See below.
Please ask questions if you need assistance with the account number.

**PURCHASING CARD REPORTS:**
These are typically transactions *not* associated with a travel report (ie. Supplies, meal for candidates, food for event).
- This report header would be **PC*(first 4 letters of your last name)***(date you are completing the report)**. Looks like this: PCLAND06032016
- The start and end date would be the day you are doing the report (not the day you made the purchase).
- Business purpose is the same as above. What is the reason for the transaction? Doesn’t need to be elaborate because the system will only allow so many characters in that box. If you bought supplies for class then say “Instructional Supplies for class”.
- Information regarding account number is the same as above.

**REIMBURSEMENT REPORTS:**
This report is typically used when the university owes you money. An example of this would be if you were requesting personal vehicle mileage for travel to supervision sites.
- The report header would be similar to the ones above. It would be **RE*(first 4 letters of your last name)***(date you are creating the report)**. Looks like this RELAND06032016.
- All other information is the same as the Purchasing Card reports! Info on page 10.

**Step 5:** Once you have completed the “create a new expense report” page, you will click at the bottom of the page. You will get a small pop up window that looks like this:
If you are requesting “per diem” with your travel report, then you will say yes. Most generally you will say no to this question. Per Diem is the only time you say yes to this question.

**Step 6:** After you select “no” you will be taken to the next report page. It looks like this:

Most expenses come up automatically as “undefined”. Occasionally if you specify in the purpose box at the beginning of the report that you purchased supplies, then the expense type may default to “supplies” but it can always be changed and you would follow the same directions as below.

You can at this point click on the word undefined and it will change the page to the right of the expenses. See below.
Any boxes not already completed need to be complete. Once you click the down arrow for expense type and select the expense type the box will change slightly. For this step by step guide, I am working on a travel expense for Dr. Beth VanDerveer and the expense is a conference registration.

After you find your expense type, additional boxes show up to be filled out. Anything with a red line in the box must be completed or you will not be able to submit the report. See below.

The boxes are self-explanatory, but make sure they are all filled out.
Step 7: After all of your boxes are filled in please hit the bottom “save” button. This will save the information you have entered to this point.

Step 8: After you have saved your work you must attach the receipt. At the bottom of the page where you saved the report is a box that says “attach receipt”. You need to click that and it will pop up a box for you to begin uploading your receipt.

Click browse and find the receipt from wherever you saved it on your computer. Please make sure you are aware that only certain formats are acceptable. See box for details. Once you have selected your receipt you can select the “attach” button.

Step 9: It’s not necessary but a habit to get yourself into. At this point it takes you back to the completed report page. After the receipt has been attached, it’s always best to hit the save button at the bottom again. This ensures that any changes have now been saved.

Step 10: At the top of the page you will hit the “submit report” button.
- A box will pop up that says “final review” and you will hit submit report again.
- The next box pops up that says “approval flow for report: (report header name). You must click “submit report” again.
- A pop up window will show that your report has been submitted successfully. It will also give you details as to how much money is due to employee (reimbursement purpose only) and how much is due to Ohio MC. When this box comes up you can click close.

Additional note: After you have submitted the report it will bring you back to your home screen that looks like this (see next page).
This shows you that you have no further “available expenses” (where it says “all clear”). It also shows the report you just completed in the “active reports” box. The green indicates that it has been submitted by you, and shows who the next person to approve the report is. In general all reports by faculty should default to the department chair for approval. This image above shows Dean Middleton because it is a report from the department chair. Beth Lydic approves the reports after the department chair approves it.

**ERRORS**
If for some reason there is an error with your report and it gets sent back to you for corrections, you will receive an email notification from Concur with the comments on why it was sent back. You will also notice when you sign into Concur that the active reports will show RED in the box instead of the green that is shown above.

**PER DIEM**
This is for when someone travels and request per diem for meals. Please make this mental or physical note somewhere for your reminder. You are NOT allowed to purchase meals on your purchasing card unless it is for a business meeting. When you travel to conferences, you should purchase your meals and then be reimbursed by using Per Diem. IF, while you are traveling, you have a planned business meeting with someone, you can at that point, use your purchasing card. Please make sure you have the information of who you met with because it will ask you for that information when completing the concur report.

**TRAVEL REPORTS: CLAIMING PER DIEM**
This will walk you through how to create an itinerary to go along with your report.
Start first by creating the TR report using steps from Page 3 and 4 (box shows “Travel Allowances” and you have to click yes or no. If you are claiming per diem then you will click yes. Once you click yes, a box will come up that says “Travel Allowance For Report: (report header name: TRLAND06032016). See below.

To complete this section you must create a stop for your entire trip. Example:
- Departure City: Athens, OH  Arrival City: Columbus, OH
- Date: First date of travel  Date: First date of travel
- Time: Time you left Athens  Time: Time you arrived in Columbus

After you have completed that you will hit save and continue adding your remaining destinations. After you have added all of your destinations it will look like this:
After you have all of your destinations entered, you will go to the bottom of the page and click “next”. The screen will then show you the itinerary you just created. Click “next” again! The final screen will show you the expenses and adjustments, giving you the chance to select any meals that were provided for you during your travel. The allowance amount to the right of the box will change depending on what boxes you check (if any).

When you have completed this step please go to the bottom and click “create expenses”. This will bring you to the page you are familiar with.
From here you will follow the steps from previous pages. Click on each expense “Fixed Meals”. It will open up the charge to the right hand side.

The natural account code for fixed meals is “domestic travel”. Once you have clicked that in the natural account code. Click save at the bottom of the page. After all transactions have been completed and saved, the red exclamation points seen in the previous picture will be gone.

**IMPORTANT FACT:**
When you are requesting per diem on a report you must provide something from the travel in which per diem was warranted (ie, conference itinerary). This can be added to the report by going to the top of the page and clicking the small blue receipts word.

Once you click receipts, it will give you the option to “attach receipt image”. Follow the directions to upload the receipt and click save. You can at this point submit your report if you are finished.

Please remember: If you are requesting per diem, it has to be attached to a travel report, unless there are no additional expenses to report, you may then put it on a RE (Reimbursement) report.

**REIMBURSEMENT REPORT**
As mentioned several times, if the university owes you money, you have to create it on an RE report. If you are doing per diem and there are no additional purchasing card charges you can create an RE report and create the itinerary as explained in pages 9 and 10. If there are additional things you need reimbursed for, such as mileage reimbursement, or airport parking that you paid for out of pocket you can add it to the same report as the per diem. Because these are expenses that will not have an expense already in concur you must create the expense. At the top of the report (under the header name) you should see “new expense” and “quick expense”.
Click new expense and the large grey box will show on your screen that looks like this:

- You will notice that there are several expense types to pick from. If you are requesting personal vehicle mileage then click personal vehicle mileage and the system will create an expense for you.
- This will bring up the box for you to fill out again (see below).
- Please note that once you have completed all boxes you must click the blue hyperlink that says “mileage calculator”. This will bring up a google map. It will give you the option to “make round trip”.

- After you select to make it a round trip you can click the bottom right hand corner box that says “add mileage expense”. Save report and add additional expenses or submit your report.
Adding a Delegate (Administrative Specialist) in Concur

The purpose of this is essential and should be done as soon as you get access to concur. This will allow the administrative specialist to assist you with your expense reports.

Step: 1
Login to Concur

Step: 2
Click on the profile button in the upper right hand corner next to the profile picture symbol
Step 3:
After clicking on the profile button a drop down menu will appear. Click on Profile Settings.

Step 4:
On the Profile Options page click on Expense Delegates

Step 5:
Click the Add Button
Step: 6
Click in the empty add space

Step: 7
Type in email address, employee name or login id (Type in landruc1@ohio.edu for me)-since I can’t add myself as a delegate, I used Beth VanDerveer as a reference.
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This box will come up after you have selected my name and hit the Add button. You will need to check the following boxes: Can Prepare and Can View Receipts. I do NOT need to receive emails on your reports so please make sure those boxes are not checked.

After you have the boxes checked please click the SAVE button.