

## **IMCS Department – Commercial Driver’s License (CDL) Reimbursement – Concur Guidance**

**It is understood that after successful acquisition of a CDL, the employee must use Concur to submit for reimbursement. The following is intended to assist employees with using Concur for this purpose. Please reference the attached official Concur Expense Guide for more detailed information.**

### **Accessing Concur from an Amtrak computer:**

- 1) Go to All Aboard (Amtrak homepage)
- 2) Click Applications on top right
- 3) Click Concur
  - a. You will be required to sign in, which requires having an Amtrak email; if you do not yet have one, see below
- 4) Hover on “New” and click “Start a Report”
- 5) Enter Data fields (Cost Center, WBS, I/O, Business Purpose of CDL – ask manager codes if unsure)
- 6) Click “No” to Travel Allowance of the Data Field Screen
- 7) Click “Create Report”
- 8) Click “Add Expenses”
- 9) Click “Conferences, Seminar/Course Fees”
- 10) Fill out Information in Data Field
- 11) Click “Add Receipt”
  - a. See below for how to add all necessary documents
- 12) Click Save / Submit Report

### **How to upload more than one receipt/document**

- 1) Click the line item of the CDL receipt (box next to the line item)
- 2) Click the tab that says “Manage Receipts”
- 3) Click “Manage Attachments”
- 4) Click “add” then upload all documents
- 5) Click “Save”

### **Accessing Concur from an Amtrak device:**

- 1) Go to “Comp Portal to download Concur app
- 2) Open Concur app
- 3) Go to “Create” and then follow prompts (similar to above)

## **Requesting an Amtrak email address**

Option 1 (preferred)	Send an email from your personal email account (e.g., yahoo.com, gmail.com, etc.) to <a href="mailto:amtrak servicedesk@amtrak.com">amtrak servicedesk@amtrak.com</a> . <ul style="list-style-type: none"><li>▪ Include the phrase <i>Frontline Worker Email Request</i> on the message's subject line.</li><li>▪ Include your full name and employee number (SAP ID) in the body of the message.</li></ul>
Option 2	Call the Amtrak Service Desk at 1-800-772-4357 and tell the agent that you are requesting a frontline worker email account
Option 3	Submit a request through the IT Self-Service Portal: <a href="https://amtrak.service-now.com/sp?id=kb_article&amp;sysparm_article=KB0014685">https://amtrak.service-now.com/sp?id=kb_article&amp;sysparm_article=KB0014685</a>