Your guide to claiming expenses In Concur for CUPE 3903 Members

For Professional Expense Reimbursement (PER), Conference Travel Fund Reimbursement and/or Research Grant Fund Reimbursement

WHERE TO GET HELP?

Department of Faculty Relations – for PER balances, other PER questions or questions around Conference Travel or Research Grants

Rhonda Brown Email: rbrown24@yorku.ca

Faculty Relations General Email: frinfo@yorku.ca

Concur Online Training Material
eLearning: How to Prepare & Submit a Claim in Concur - University Services Centre

Concur User Support Desk – for navigational & application assistance
By Phone (available in English 24/7/365 from Canada/US): Call **1-866-793-4040**

York Expense Desk – for policy and functional assistance expdesk@yorku.ca

Sm@rtBuy Vendor Purchasing System – for assistance making PER purchases using preferred vendors

Sally Murciano Email: sally.murciano@dataintegrity.com

General support Email: smartbuy@yorku.ca

STEP 1: ACCESSING YOUR CONCUR ACCOUNT

- Go to the University Services Centre page of the York University website York

University – University Services Centre (USC)

- Scroll to the bottom of the page and click on the "Expense Reimbursement" box
- Click on the Quick Link for "Concur"
- Under the "Sign in with:" select "Passport York". This will prompt you to a Passport York log in page then you will be launched to Concur's Homepage

***Note: All active employees with a Passport York and Central Email account will have access to Concur. If you have not set up your Employee Passport York and/or Central Email accounts, please do so by referring to the online instructions at: Passport York | UIT**

STEP 2: SETTING UP YOUR PROFILE

The first time you log into Concur, you will need to set up your profile. You may also make changes to is as needed from time to time. To do so:

- Click on your initials at the top right hand corner of the screen and select "Profile Settings"
- In this menu update your Personal Information:
  - include your work and home phone numbers
  - add and/or verify your email address (this is a one time requirement)
  - update any required information
  - add any emergency contact information (optional)
  - update your travel preferences (optional if you may be required to book on-line travel)
- Click on the Expense Approvers option on the left hand menu to set up approvers. If you will only be using Concur for PER, Conference Travel and/or Research Grant Fund reimbursements, add Rhonda Brown as the default approver.
- If you choose, you can also add Concur to your tablet or phone in order to prepare and submit expenses, if you want to do this, click on the "Concur Mobile Registration" in the "Other Settings" section. As well, instructions on this can be found in the quick link area of the "Expense Reimbursement"

section (as noted above)

- When complete, click back on the “SAP Concur” button at the top left of the screen to go back to the home page.

Note: Expense reimbursement is paid to the same account that you have set up for your payroll. If you wish to change this, it will change for both expense and payroll and you will need to submit a change in banking information through HR Self Service.

STEP 3: SCANNING YOUR RECEIPTS

All expense reports must include receipts for all items seeking reimbursement in accordance with the Professional Expense Reimbursements Guidelines.

*Note: Concur accepts receipts only in **.png, .jpg, .jpeg, .pdf, .tif or .tiff** formats. It does not accept Word or Excel files. There is a 5 MB limit per file.*

- Scan and upload your receipts to your Concur account by:

  UPLOADING FROM YOUR LOCAL WORKSTATION - scan your receipts from a local network connected scanner or copier, take photos of your receipts or using a scanner app scan and email them to yourself. Save the images to your computer to be uploaded into Concur.

  OR

  SET UP E-RECIPTS IN CONCUR – This option is available from the Concur home page or in the your profile in the “Other Settings” section under “E-Receipt Activation”. In setting this up, you will be able to have receipts pre-populate into Concur from participating vendor partners.

  OR

  GO MOBILE – Download the Concur Mobile App for your phone or tablet and upload images directly to your expense report, you will also need to activate this option from your profile.

- As needed, in the bottom section of this page, click on the “Upload Receipt” button to upload receipts saved to your computer.

STEP 4: CREATING AN EXPENSE REPORT

Please ensure that all associated expenses are entered and submitted on the same expense report. If you are submitting for more than one of PER, Conference Travel or Research Grant, please be sure to create separate reports for each of these different funds (as cost centres are different for each).

- To start a new report, click on the blue “Create” button, the first button on the left across the top menu
- Select “Start a Claim”
- Give your report a name – Ideally the name should include your name as well as the type of expense (ex. Name – PER January 2025 or Name – Conference Travel for “conference name”)
- If the purpose of the claim is related to travel, please include the travel location, start and end dates of travel in the appropriate areas.
- Outline the purpose of the claim, including more specific details regarding the claim (ex. dates and location of conference, type of purchases for PER).
- Ensure “Claimant Category” is correctly listed as “Faculty”
- You will need to set up your Fund, Cost Center Category, Cost Center Number/Description and Activity code details as outlined below:
    - Fund:
        - PER, Conference Travel or Research Grants – **(200) Operating Fund**
    - Cost Center Category:
        - PER, Conference Travel or Research Grants - **(FUND 200) Operating**
    - Cost Center Number/Description:
        - PER – **233942**
        - Conference Travel - **233250**
        - Research Grants – This is a personalized 6 digit cost centre assigned to you beginning with a 4. If you don’t know your code, reach out to Faculty Relations
    - Activity Code (only required for PER expenses):
        - PER – This is a personalized code assigned to you, if you don’t know this code, reach out to Faculty Relations

- Once done, click the blue “Create Claim” button at the bottom of the page

STEP 5: ADD YOUR EXPENSES

If you have added receipts already, they will appear in this window. You can click on a receipt to add it to the report or you can also click on the “Add Expense” to add a new item.

**Note, instructions below are based on using the “Add Expense” option*

- Click on the “New Expense” tab at the top of the page
- Choose the appropriate category for your expense, either in the menu or by using the search field. Please do NOT select “Other PER Expenses”.
- Once you select the type of expense, in the new window complete the following:
    - “Date of Purchase” based on the receipt
    - Vendor name (optional)
    - City the expense occurred in, as you start typing, it will provide options you can select
    - Ensure the “Payment Type” is listed as “Claimant Paid” meaning you paid for this
    - Total amount (including any taxes)
    - Currency that was paid (if not in Canadian dollars, the system will calculate the exchange)
    - For PER, if you did not enter your Activity Code when creating the report, enter it here
    - Include any additional comments as may be required (if the amount for reimbursement is less than the total receipt, outline why, etc).
- In the “Receipt” section, if there is no receipt already loaded, click on the “add receipt” and select it from receipts available or search your computer for the correct file
- If you have additional expenses to add, click on the blue “save and Add

Another” button, if not, click on the “Save Expense” button

- Once all receipts have been uploaded and expenses created, click on the blue “Submit Claim” button
  **Note, you can come back and edit, add to your expense report at any time and do not have to complete all expenses at once.*

STEP 6: REVIEW THE STATUS OF YOUR REPORT

Prior to submitting your expense report or after you have submitted your report, you have the ability to see the status of your report(s).

- From the main menu, click on “Expense Claims”
- On the “Manage Expenses” tab you can select from the “Claim Library” drop down active claims, those being worked on or not yet paid or other claims that have been submitted and paid
- You should also see at a glance a summary of any active claims including the amount and their status (pending financial review, pending approval, etc.)

STEP 7: UPDATING YOUR EXPENSE REPORT

In the event there are issues with your expense report, it may be sent back to you for review, there will be comments included as to what you will need to address. Please review the instructions, update accordingly and re-submit.