SUBMITTING A REQUEST FOR REIMBURSEMENT

FINANCIAL PRINCIPLES:

- **All receipts are required** and must be itemized, regardless of transaction amount. All receipts must be scanned and submitted electronically.
- Students requesting reimbursement must submit their own requests online through Concur; no one can submit the requests for them.

SETTING UP YOUR PROFILE IN CONCUR

⇒ You only have to set up your profile once, before you submit your first request for reimbursement
⇒ Begin with the "Manage the Concur Profile" video and follow along, pausing as necessary to complete the steps. Video is available at: http://upkdocs.princeton.edu/Prime/Manage_the_Concur_Profile/Index.html

Note: not all Concur functionality is enabled for students (including travel booking), so some of the items in the video and on the profile will not apply. Also, some of the instructions make sense for employees, but not for students, so follow this written guide carefully and when the instruction here differs from the video, follow these directions.

⇒ Go to www.princeton.edu/concur and sign in

Travel Alert Section: You can activate TripIt Pro, E-Receipts. Enable and register mobile device, and download the Concur app.

Profile tab at the top: enter personal information, email address, emergency contact info

Default Approver

From the Profile tab, click Expense Approvers on the left hand side under "Expense Settings".

Type **Lily Secora's name** in the field and select from the dropdown list. Click Save.

Expense Delegate

From the Profile tab, click Expense Delegates. Click Add.

Type your **Treasurer's name** in the field and select from the dropdown list (if you are the Treasurer of your group then you don't need to enter an Expense Delegate).

Check off "Can Prepare", "Can View Receipts", and "Receive Emails". Click Save.

Expense Information

From the Profile tab, click Expense Information.

Enter your group chart-string account

PREPARING YOUR EXPENSE REPORT

⇒ **You should submit one expense report per student group you are requesting money from.** A report can have multiple charges, but they should all be coming from the same chart-string account (i.e. student group).
⇒ Deadline for submitting an expense for reimbursement: you must submit an out -of-pocket expense for reimbursement **within 30 days of the transaction date.** If you submit it after more than 30 days, the request may be denied.
⇒ Saving receipts to Concur for future use using the "Receipt Store": if you anticipate using Concur often to request reimbursement, you should download the Concur app so you can easily save receipts on the go.

- Go to www.princeton.edu/concur and sign in.
- Go to "Profile" tab and click on "Mobile Registration" in the secondary menu.
- Create PIN and send a link to your mobile device to download the app.
- You can take photos of receipts on the go using your phone and they will populate in your Receipt Store.

⇒ To prepare your request for reimbursement (“expense report”).

- From My Concur homepage, locate “Active Work” window on right side of screen
- Click “New Expense Report”
- Fill in Report Header information
  - ◊ Report Name: Should include your name, group name, and the date you’re submitting the request. Ex. “L. Secora, GSG, 9-2-14”
  - ◊ Enter an option in “Report Type” – if mostly domestic charges, put domestic. If mostly international, put international
  - ◊ Business Purpose: Enter summary information regarding the charges.
  - ◊ Trip ID: Enter your student group name
  - ◊ Department: insert your group’s department #.
  - ◊ Fund: insert your group’s fund information
  - ◊ Program: insert your group’s program information (NOTE: the majority of student groups only have a Department and Fund chart-string. Please leave Program blank if you were not given Department, Fund, & Program chart-string)
  - ◊ Click “Next”
- Enter a single expense
  - ◊ Select an expense type from the menu on the righthand side of the screen.
  - ◊ Enter relevant information like transaction date, vendor name, amount etc.
  - ◊ Business Purpose: Enter more specific information about the charge
  - ◊ Comment: If more information/explanation is needed, include it here
  - ◊ For group meals under 10 attendees, attendee names and positions are required. Add attendees in the bottom section of the Expense screen.
  - ◊ If prompted, itemize your expense: looking at your receipt, fill in the various amounts that contributed to the total.
  - ◊ Click “Save”.
  - ◊ Click “Attach Receipt” at the bottom of the screen.
    - * Upload a receipt image or retrieve a receipt from your Receipt Store.
    - * Click “Attach”
- When you’re finished with one charge, you can add additional ones, provided you’re requesting reimbursement from the same chart string account.
  Click “Submit Report” in the upper right corner of the screen.
- **If you are a student organization officer and you are requesting reimbursement from your group’s chart string account then your expense report will be reviewed and approved by Dean Secora. If you are requesting reimbursement from a group’s chart string account and you <u>are not</u> a student organization officer for that group then Dean Secora will have the group’s Treasurer review and confirm your reimbursement request before she can approve your reimbursement request.**

⇒ Tracking and Receiving your reimbursement

- Be sure to sign into Concur often to check the status of the expense reports you’ve submitted in case has sent the report back to you for clarification or more documentation.
  - ◊ You can check the status of your report in the “Active Work” section of the My Concur homepage
  - ◊ When it says “Approved” you can expect your money shortly.
- When your reimbursement is approved by the Office of Finance and Treasury, you will receive it one of two ways:
  - ◊ If you’re signed up for direct deposit, the money will go into your account
  - ◊ If you’re not signed up for direct deposit, you will receive an email from Princeton letting you know you have a check for pickup at the Financial Service Center on the 7th floor of New South.

FOR MORE INFORMATION

⇒ For technical guidance on how to prepare an expense report, refer to the following website: https://finance.princeton.edu/how-to/prime-information-trainin/travel-expense/enter-approve-expense-rep/index.xml

⇒ For technical assistance and troubleshooting, contact the Financial Service Center during business hours at 609-258-3080 or finance@princeton.edu, or visit the 7th floor of New South.

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