HELPFUL HINTS

- Reimbursement for travel expenses which have a business purpose and are paid with personal funding sources are submitted through Concur expense and must include itemized receipts.
- A travel request must be approved prior to submitting an expense report, with the exception of a non-travel expense.

PROCEDURE

1. To create an expense report, locate the approved request from the active requests screen. Click on expense.

2. Enter the required fields for the transaction, which are indicated with a red bar.
3. Check the box next to the request name to link the approved request to the expense report. Click on next.
4. The travel allowance pop-up window appears. Click on yes if meals or lodging will be added to the report.

![Travel Allowances pop-up window]

5. Enter an itinerary stop for each final destination of the trip. Click on Save for each stop.
   
a. For a roundtrip, two itinerary stops will be created. Do not include layover stops.
   
b. Multi-stop trips require an itinerary stop for each destination.

![Itinerary stop screenshot]

6. Click on next.
7. The itinerary is displayed. Click on next.

8. If applicable, check the box for any meals that were provided during the trip. Click on Create Expenses.
9. The new expense screen appears. To add an expense to the report, select the expense type from the right-side menu.

10. Enter the required fields for the transaction, which are indicated with a red bar.

a. For expenses pre-paid by the university or state college, select *Company Paid* from the payment type dropdown menu.
b. For expenses paid by the traveler, select *Cash/Personal Funds*.

11. Click on **Attach Receipt**.

12. Browse and attach a receipt or use an available receipt.

13. To view the attached receipt, click on the receipt tab. Otherwise, click on save.
14. Continue adding expense types and attaching receipts.
15. When the expense report is complete, click on **Submit Report**.

The expense report has now been submitted for financial approval. No further action is required.