
United Network for Organ Sharing

Expense Reimbursement Process

Concur Expense

SAP Concur 

What is Concur Expense?

- Concur Expense will capture spending from multiple sources, help travelers plan and make spending decisions based on accurate data, expedite the reimbursement process and simplify the expense reporting process for everyone.
- Individuals who have paid for pre-authorized, business-related travel expenses with personal funds may be reimbursed in accordance with the UNOS policy. All reimbursement requests must be accompanied by receipts or supporting documentation.

Getting Started – Logging In

- UNOS Employees
 - Username: your UNOS Email Address
 - Password: select UNOS Entra ID for SSO
- Committee/Board Members:
 - Username: UNOS + your email address in email (i.e. UNOSjohn.doe@transplanthospital.org)
 - Password: click on the link and follow a password resetting process or select 'Forgot My Password' to reset

Getting Started – Profile Settings

- Personal Information
- Email Addresses
 - Entering an additional email address will allow you to send receipts directly from that email to Concur
 - This is helpful if your work email is not on your tablet or smartphone
- Bank Information
- Concur Mobile Registration
 - Download the app directly to your phone from the AppStore
 - Send an email link to download the app
- Expense Delegates

Email Address Verification

- Enter a new email address that you would like to be able to forward receipts to Concur Expense and select 'OK'

Enter email address
emailaddress@email.com

Contact for Travel Notifications?
 Yes No

OK | Cancel

- Select *Verify* and the system will send an email with verification code
- Copy the verification code and paste it into the *Enter Code* field and select OK

Check email for code Resend | Cancel No

Enter Code

OK

- Verify any email addresses you might use to send receipts to receipts@concur.com

Email Verification Status

 Your email address has been verified.
You may now send receipts to Concur by emailing receipts@concur.com

OK

Bank Information

- Under Expense Settings, Bank Information will need to be filled out prior to submitting any expense reports
- Fill out all required information and select Save

Your Information

Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings

Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Expense Settings

Expense Information
Bank Information

Expense Delegates

- A delegate can create expense reports on behalf of another Concur user
- You may assign a delegate to your account under your profile in expense settings
- If you are assigned as a delegate for someone, you can view that information in the 'Delegate For' section

Expense Delegates

Delegates Delegate For

Add Save Delete

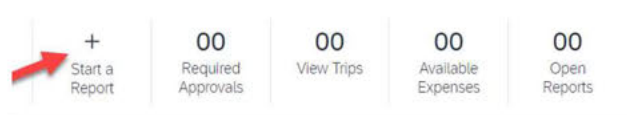
Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

Entering an Expense Report

- Select 'Start a Report'



- Name of Report

- This should be short, but descriptive and include any necessary travel or reimbursement information

- Examples:

- Name of Committee Meeting, Date
- Research Conference, Date, Presenter (or Attendee)
- Site Survey, Date, Center Code
- HQ Visit, IT Department, Date

- Only one expense report should be submitted for each meeting/request

Entering an Expense Report

- 'Header' Information prepopulates for remainder of expense report saving time and preventing entry errors for multiple receipts
- Account, Division, Project and Department information may be prefilled
 - You will need to verify that this information is accurate for each expense request
 - Account is the nature of the expense (Committee meeting, Regional meeting, General Travel)
 - The following selections will be dependent on the Account option selected first
- Business Purpose can be left blank in this section as this will be required for each expense entered

The screenshot shows a 'Create New Report' form with the following fields and values:

- Report Name: (empty)
- Report Date: 11/13/2023
- Business Purpose: (empty)
- Account: (76010) Team Meetings
- Division: (U) UNOS
- Project: (0000) UNOS
- Department: (311) Accounting

Entering an Expense Report

- Transaction Date should be the date of the expense
- Business Purpose must be filled out for each expense entry
 - This information should include the purpose of the expense request
 - Example – Mileage to drive to airport for Committee Meeting
- Payment Type and Currency are default options and should not be changed
- Amount should be entered as the total for that expense

The screenshot shows a form with the following fields and values:

- Transaction Date: MM/DD/YYYY
- Business Purpose: (empty)
- Vendor Description: (empty)
- Payment Type: Out-of-Pocket
- Amount: (empty)
- Currency: US, Dollar (USD)

Expense Report - Mileage

- The mileage calculator must be used for mileage reimbursement requests



- No receipts are required for mileage expenses

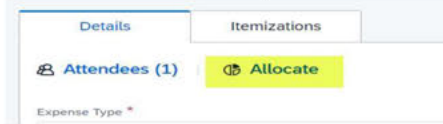
Expense Report – Allocating Alcohol

- Alcohol cannot be entered as an OPTN expense and the purchase of alcohol must be allocated separately as a UNOS private expense
- If an expense includes alcohol:
 - Amount should be entered for total cost (meal + alcohol) on the first page
 - Alcohol selection should be Alcohol + Meal (Use Allocate)

Amount *	Currency *
45.00	US, Dollar (USD) X v
Center or OPO	Account ①
	(60900) Lung Transplantation Committee X v
Division ②	Project ③
(O) OPTN X v	(30206000) Task 3.2.6 X v
Department ④	Alcohol
(340) Committee Meetings X v	Alcohol + Meal (Use Allocate) v

Expense Report – Allocating Alcohol

- To allocate the amount purchased for alcohol, select Allocate at the top of the expense report



The screenshot shows a software interface with two tabs: 'Details' and 'Itemizations'. Below the tabs, there is a button labeled 'Attendees (1)' and a button labeled 'Allocate' which is highlighted in yellow. Below these buttons, there is a label 'Expense Type *'.

- Select Add and make sure that the Division selected is changed to UNOS (you will need to reselect the options for Project and Department as well)
- The Alcohol selection should also be changed to Alcohol Only
- Select Save
- Once saved, enter the amount of **only** the alcohol purchase

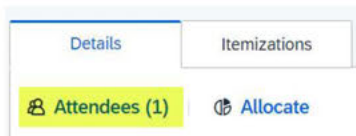


The screenshot shows a vertical list of dropdown menus. The first menu is labeled 'Division *' and has '(U) UNOS' selected. The second menu is labeled 'Project *' and has '(0000) UNOS' selected. The third menu is labeled 'Department *' and has '(340) Committee Meetings' selected. The fourth menu is labeled 'Alcohol *' and has 'Alcohol Only' selected.

Alcohol↓↑	Code↑≡	Amount USD
Alcohol Only	60900-U-0000-340-AB	15.00

Expense Report – Multiple Guests

- To add additional guests for an expense, select the Attendees option at the top of the expense report
- Choose the type of attendee: Business Guest, Employee, or Employee (not using Concur), then enter their name or email address to search, and select the person from the options presented



The screenshot shows a software interface with two tabs: 'Details' and 'Itemizations'. Below the tabs, there is a button labeled 'Attendees (1)' which is highlighted in yellow, and a button labeled 'Allocate'.

Expense Report - Hotels

- Hotel expenses will require you to enter the date range of your stay

Expense Type *

Hotel

Date Range * Nights:

11/13/2023 - 11/17/2023 4

Uploading Receipts

- Email receipts to receipts@concur.com OR to receipts@expenseit.com (if Expenselt is turned on in your mobile app profile, Concur will analyze picture of a receipt and automatically generate an expense item)
- Mobile App receipt image capture
- Upload receipt image from desktop when creating expense report
- If a receipt is lost and a copy cannot be obtained, you can provide a Missing Receipt Declaration
 - To do this, select Add Receipt and select the Missing Receipt Declaration link

Attach Receipt ×

Available Receipts (5)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration. [Missing Receipt Declaration](#)

Warnings and Errors

- Concur will notify you of any potential warnings or errors that will prevent you from submitting an expense report
- These alerts will appear after you save an expense and will provide detail of why you are receiving the alert
- If you select View, that link will bring you to the specific error/warning to correct

Alerts: 3

All 2 1

Expense	Dinner	11/01/2023	\$105.00
✖ The expense amount exceeds \$45.00 per attendee. Please provide an explanation within the comments. View			
✖ OPTN (O) cannot be selected for Alcohol. Please select another option or edit it to a private division (U/SIC). View			
⚠ You must attach a receipt image to this expense. View			