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: UN05 + 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’

- 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

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

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
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

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

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
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)
Expense Report – Allocating Alcohol

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

- 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.

<table>
<thead>
<tr>
<th>Alcohol</th>
<th>Code</th>
<th>Amount USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcohol</td>
<td>60900-U-0000-340-AB</td>
<td>15.00</td>
</tr>
</tbody>
</table>

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.
Expense Report - Hotels

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

<table>
<thead>
<tr>
<th>Expense Type *</th>
<th>Hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range *</td>
<td>Nights:</td>
</tr>
<tr>
<td>11/13/2023 - 11/17/2023</td>
<td>4</td>
</tr>
</tbody>
</table>

Uploading Receipts

- Email receipts to receipts@concur.com OR to receipts@expenseit.com (if ExpenseIt 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
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