GUIDE: Submitting Visitor/Guest Expense Claims in Concur

WHERE TO GET HELP?

Concur Online Training Material
https://emplearn.yorku.ca/ConcurExpense

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
Piera Li       Email pierali@yorku.ca       416-736-2100 ext 20233
Sonia Fermin-Peat Email ferminps@yorku.ca 416-736-2100 ext 40150
Yan Liu       Email yliu2015@yorku.ca    416-736-2100 ext 22003
Introduction

York University often reimburses travel expenses incurred by visitors and guests who conduct University business. Claims for reimbursement for these expenses are often prepared by University faculty or staff. Visitor/guest claims can now be prepared and submitted in Concur.

In order to complete a claim for reimbursement for a visitor/guest of York University, you must have access to the following systems:

1. Concur Expense ("Concur")
2. Peoplesoft Supplier Registration ("Supplier Registration")

Accessing Concur

All current employees of York University with an active employee Passport York ID and central email ID can access Concur. If you have not set up your Employee Passport York & Central Email Account please do so by referring to the instructions on the University’s website.

Accessing Supplier Registration

To access supplier registration, you must have an active employee Passport York ID, a central email ID, and obtained approval from your manager to access the module for the purpose of filing visitor/guest expense claims. If you already have access to Supplier Registration, please proceed to Step 2.

Submitting Visitor/Guest Expense Claims in Concur

Step 1. Request access to supplier registration

In order to prepare a claim for a visitor/guest of York University, you must request a Concur account for the claimant using the Supplier Registration system.

To receive access to Supplier Registration, please obtain approval from your manager by sending them the following request:

“Faculty and staff at York University are able to prepare expense claims on behalf of Canadian and US visitors/guests to York University using Concur. Once expense claims are approved in Concur, payment is issued directly to the visitor/guest in CAD or USD. In order to request a Concur account for a visitor/guest, I require access to Finance’s Supplier Registration system. Please respond to this email indicating your approval to have access to this system.”
After receiving approval from your manager, please forward it to venreq@yorku.ca with the subject line “Request Access to Supplier Registration”.

You will receive email confirmation of your access to Supplier Registration.

**Step 2. Request a Concur account using Supplier Registration**

To request a Concur account using Supplier Registration, follow the instructions for [Supplier Registration for Visitors and Guests](#). [IMPORTANT: The York employee who will be preparing and submitting the expense claim on behalf of the visitor/guest should complete the request for a Concur account].

**Step 3. Obtain Original Receipts from Claimant**

York University requires expenses to be supported by original receipts. Please obtain hard copy original receipt or high quality images of the original receipts from your claimant. The claimant will be required to attest to the authenticity of the receipt images before the claim can be submitted (see instructions on *York-Visitor Representation and Authorization form*).

**Step 4. Complete and submit an expense claim for the visitor/guest.**

As a delegate, you can access your visitor/guest’s Concur account from your own account in the same manner you access the account of other employees you support.

1. Locate the Profile menu (top right of your Concur homepage) after having logged in to Concur. Click Profile.

![Profile menu](#)

2. Under “Acting as other user”, click on the arrow to open the list of users for which you are a delegate.
3. Select the claimant for whom you would like to prepare an expense claim. Your screen will indicate that you are acting on behalf of the claimant you selected.

4. Ensure you complete the claimant’s default approvers in their profile. For instructions on how to complete the profile, please refer to the online training material in Concur.

5. Complete an expense claim for the visitor/guest, ensuring all receipt images, conference agendas, research justifications and other required documentation are attached to or entered in the claim. For instructions on how to complete an expense claim, please refer to the online training material in Concur.

6. Before submitting your expense claim, click on the Print/Email menu and select the *York-Visitor Representation and Authorization form.

7. Use the PDF option to generate the report in a printable format along with the receipt images (note: the Print option will not print the receipt images).
8. Email the form to the claimant and obtain their signature at the bottom of the form. The signed form must be attached to the claim before submitting the claim.

9. You are now ready to submit the report [note: delegates are able to submit expense reports on behalf of the visitor/guest]. Ensure you set the appropriate workflow for the expense report to obtain all required approvals. Click Submit.

10. After reading the declaration, click Accept and Submit within the Final Review box.

11. Click Submit Report within the Approval Flow screen.

**Important Information Regarding Visitor/Guest Expense Claims**

**Limitations to Concur Functionality for Visitor/Guest Claims**

The following features are not available for Visitor/Guest Claims.

1. Receipt imaging functionality for visitor/guest claims is limited. The Concur Mobile Application and the ability to email receipts to the receipt store are not available for visitor/guest claims. Delegates are required to image hard copy receipts or attach receipt images received from the claimant.

2. Attestation forms must be completed in paper form and the image attached to the corresponding expense line in Concur.

**Changes to Address and Banking Information**

Address and banking information is not stored in Concur. When filing a claim for a visitor/guest who has received a reimbursement in the past, please ensure Finance has current address and banking information. For assistance or to update address or banking information, please contact venreq@yorku.ca.