

The Service Excellence Program (SEP) is helping York achieve its vision for service excellence across the University, by implementing operational and service delivery improvement initiatives across all non-academic services.

A simplified expense claim workflow will benefit the York community

The Finance Department, supported by the SEP, recently conducted a review of current practices for processing expense claims. As a result of that review, a simplified Concur workflow has been established, which will help to improve the process.

What’s new?

Three changes will be introduced with a range of benefits to the York community:

Change	Benefits to York community
Removal of additional financial reviews. Claims will go straight to the Finance Department’s financial review after submission and will no longer require additional local reviews.	2.5 business day average reduction in process time for expense claims More time for higher priority activities Simplified claim preparation for users
Approval reduced to a single touch point. The necessary approval requirements will all occur in a single touch point, removing the need for additional approvals.	
Correct approvers prepopulated for claimants. Default 1 over 1 approver(s) will be prepopulated in most Concur profiles and updated periodically throughout the year, particularly in July. Claimants can still change the default approver.	

Why the change?

Finance found that a simplified Concur workflow was needed at York, given that:

- Some claims have up to five layers of review and approval before being processed.
- Some review steps are duplicated locally and by the Finance department.
- 25% of claims have incorrect approvers on submission because claimants must specify approvers but often don’t know who the right approvers are.

What does this change mean for you?

Local reviewers: Local reviewers are no longer required to review claims. Claims will go directly to Finance providing local reviewers more time to focus on other responsibilities.

Concur claimants: Most employees will have the correct operating, research (if applicable) or cash advance approvers prepopulated in their Concur settings to simplify claim preparation. If required, claimants can still change the approver for a claim.

Approvers: Approvers will retain the ability to assign a delegate to review claims on their behalf. Approvers can also add additional approvers to the workflow if required.

Go Live Date

8:00 PM March 19, 2021

Additional information

For more information on this change, or general enquiries, contact the Office of the Comptroller at (416) 736-5143. For information on reimbursement policy, visit the [Finance website](#).