

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

A simpler and faster Concur claim preparation experience will benefit the York community.

As part of the Service Excellence Program (SEP), the Finance Department and University Services Centre (USC) have made improvements in Concur to enable simpler and faster claim preparation. Key improvements are captured in the box below.

1. Renamed and reordered system fields to reduce confusion for claimants. For example, clarifying which fields apply only to travel related expense claims.
2. Created a new quick tips page available on the Finance website [here](#), and on the Concur landing page, that summarizes five key time saving tips:
 1. Using the University's travel card and travel partner to auto-populate most expense information
 2. Taking advantage of faster ways to upload receipts
 3. Drawing information from other expense lines or past claims
 4. Faster uploading of attendee lists
 5. Quickly allocating expense lines across multiple cost centres

Based on additional feedback from community, the team are also working on allowing users to select cost centre without first selecting the cost centre category.

These improvements to the user experience will complement earlier improvements that reduced the average processing time of expense claims from 11 business days to 5.9.

Why the change?

Workshops with users found room for improvement in the Concur user interface. Four recurring pain points were:

1. Confusing terminology and required fields, such as the use of travel dates on non-travel claims
2. Difficulty uploading receipts and attendee lists
3. Difficulty allocating expenses across cost centres
4. Challenges accessing information from similar past claims

Contributors

These improvements are due to the hard work of employees across the Finance Department and the USC:

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Additional information

For more information on these changes or general inquiries on expense claims contact a USC expense claim administrator:

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For information on other SEP Finance initiatives, please visit the [SEP website](#).