## Creating and Submitting a Reimbursement for a TCU Student

The Concur Expense module has been set-up to allow for reimbursements of current TCU Students. These must be processed by a TCU employee that has a Concur profile.

To complete a single Student Reimbursement in Concur:

- 1. Click on Expense
- 2. Select Create New Report



3. Complete the Report Header as follows:

Report Type	Select <b>*TCU Student Reimbursements</b> from
	the drop-down list
Report Name	Enter the name of the Report, Trip, Event or
	other information that describes the report to
	yourself and the Approver.
Report Start Date	Enter the first day of the reimbursement
	period
Report End Date	Enter the last day of the reimbursement
	period
Payee/Traveler Type	Select <b>Student</b> from the drop-down list
Business Unit	This will default based on your profile,
	update as appropriate.
Fund	This will default based on your profile,
	update as appropriate.
Department	This will default based on your profile,
	update as appropriate.
Project	This will default based on your profile,
	update as appropriate.
Comment	Additional information can be added here.

## Example:

Report Header	
test student \$0.00	
Report Type *	
	)
*ICU Student Reimbursements	
	·
Report Name * 🕐	Report Start Date *
Research 1234_Students	05/01/2023
Report End Date *	
05/06/2023	
Payee / Traveler Type *	Business Unit *
Student ~	(BRITE) Brite Divinity School
Fund *	) Department *
(10200) Brite General X 🗸	(12000) Brite General
Project	
· · ·	

- 4. Once the header is complete, select CREATE REPORT
- 5. Select **ADD EXPENSE** and then select the appropriate expense type.
  - o Specifically for Student reimbursements -
    - Traveler Type / Payee must always be "Student"
    - Payment Type must always be "Student Reimbursement"
  - In the Student Payee field, search for the student to be reimbursed the search will default to text, but you can update it to Code or Either to search by student id instead of the student name
  - Complete the required fields on the form and attach required receipts. You will see that certain fields will copy down from the header – this is expected, and you can change them if needed.
  - Allocate the expense if it should be charged to a different department than what was on the header.

lew Expense			Cancel Save Expen
Details Itemizations			Hide Receipt
Allocate	* Requ	ired field	5 Q Q
Expense Type *			
Parking		~	
Transaction Date *	Business / Trip Purpose *		
05/02/2023	Cooperative Extension	~	
Report / Trip Type *	Traveler Type / Payee *		
None Selected ~	Student	~	<b>RECEIPT</b> No. 123456
Student Payee *	Payment Type *		DATE
(110422618) Smith Aaron 🛛 🗙 🗸	Student Reimbursement	~	DOLLARS
Supplier *			
ABC Lots			ACCT. CASH PAID CHECK FROM TO
Amount *	Currency *		DUE CREDIT CARD BY A-2501 
25.00	US, Dollar	~	
Comment			
		10	

- 6. Repeat step #5 for each student reimbursement expense that you have to process.
  - When requesting reimbursement for multiple students, please use the preferred method of entering multiple student expenses in on expense report.
  - When creating expense reports with multiple students please input the date range in the report header which represents the majority of the student expenses being submitted.

IMPORTANT! You can include MULTIPLE student reimbursements on ONE expense report! Just make sure to select the appropriate student payee on each expense.

 If you're reimbursing multiple students and want to review – select Print/Share and then select the \*TCU Report Student Reimbursement Summary; this will show you everything you have entered and for which students.

Research 1234_Students \$25.00			
Not Submitted   Report Number: M5LI1P			
Report Details 🗸	Print/Share  Manage Receipts		
Add Expense	*TCU Report Student Reimbursement Summary *TCU Report Budget Code - Allocation + Comme		

8. Once everything has been added, select **SUBMIT REPORT**. The report will now route through the appropriate approvals.