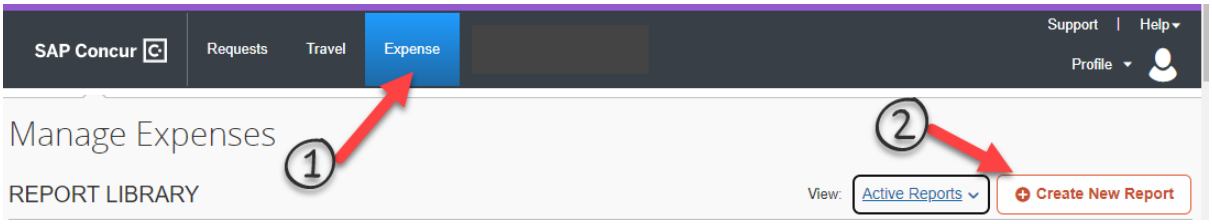
Creating and Submitting a Reimbursement for a TCU Student

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:

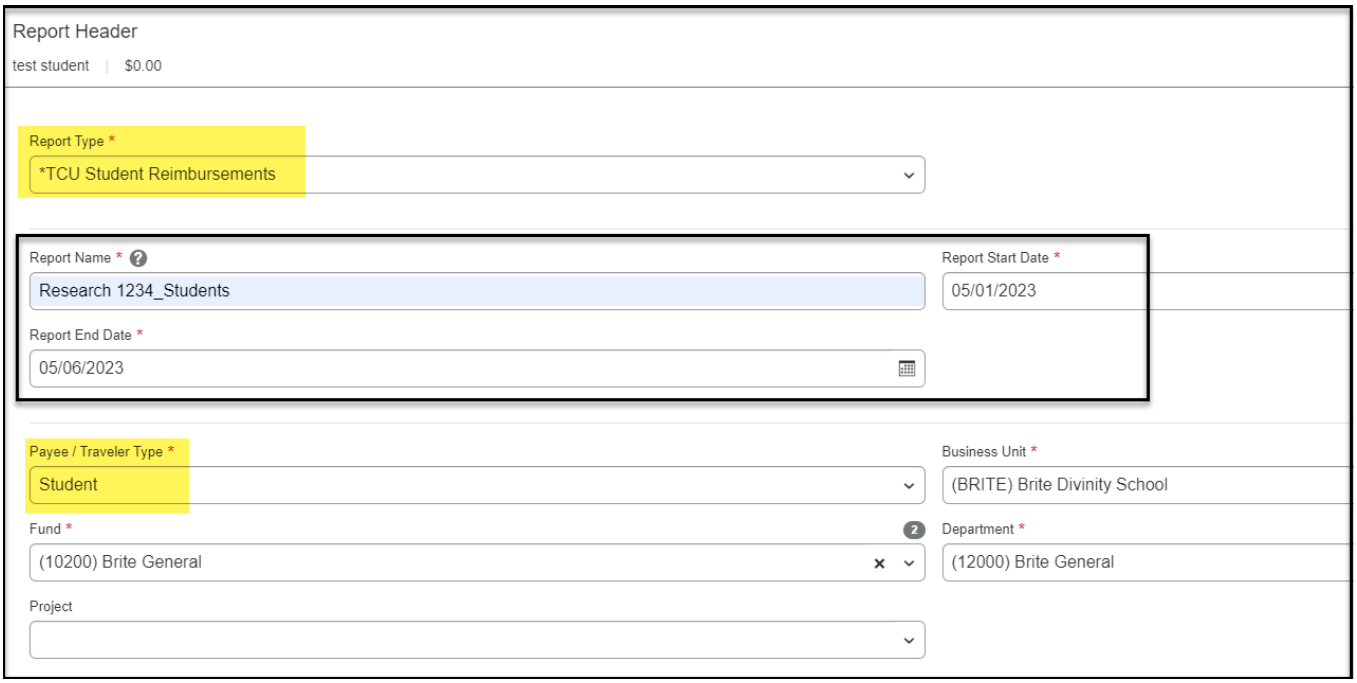
1. Click on **Expense**
2. Select **Create New Report**



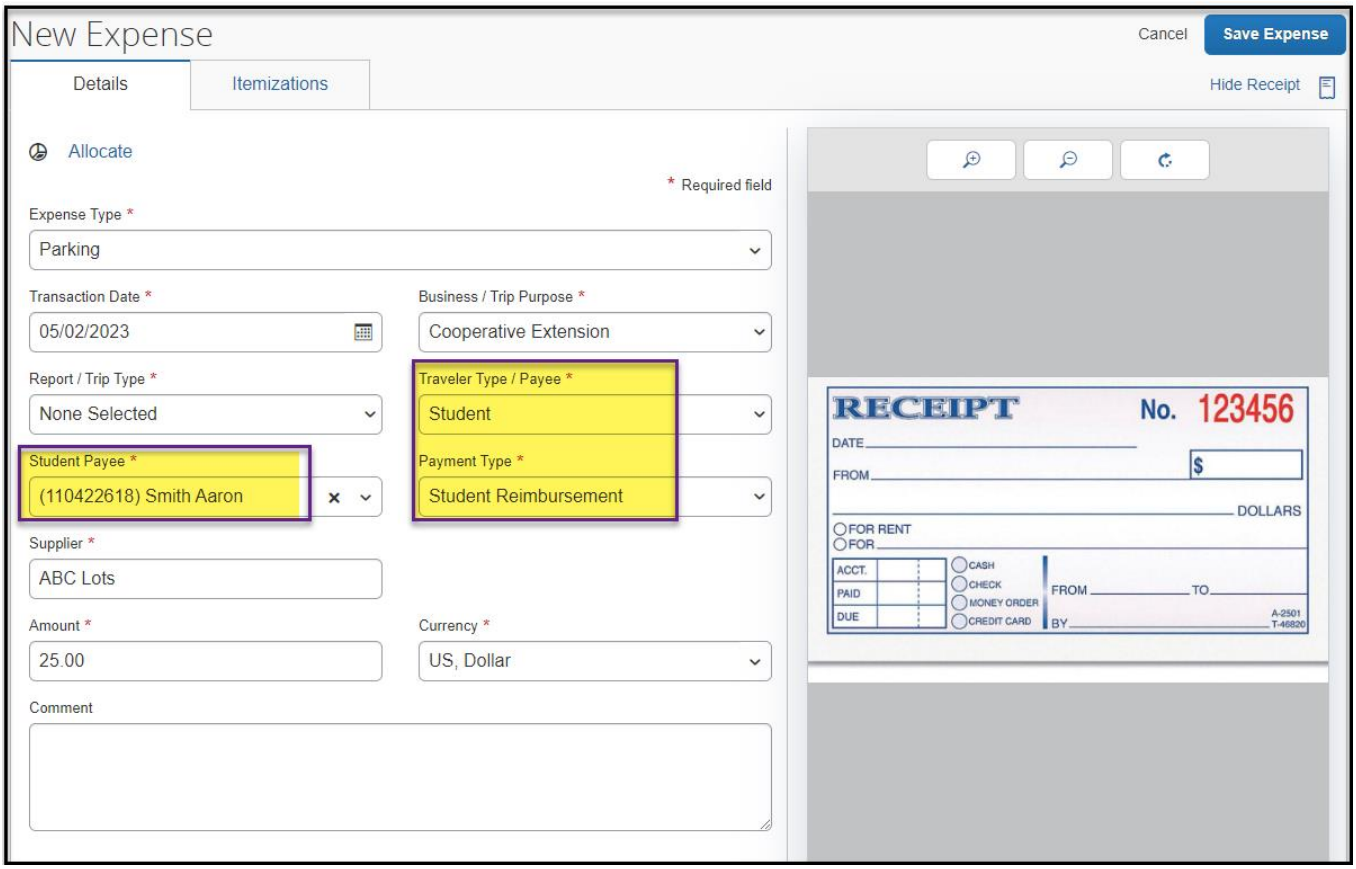
3. Complete the Report Header as follows:

Report Type	*Select ***TCU Student Reimbursements** 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 **Student** 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:



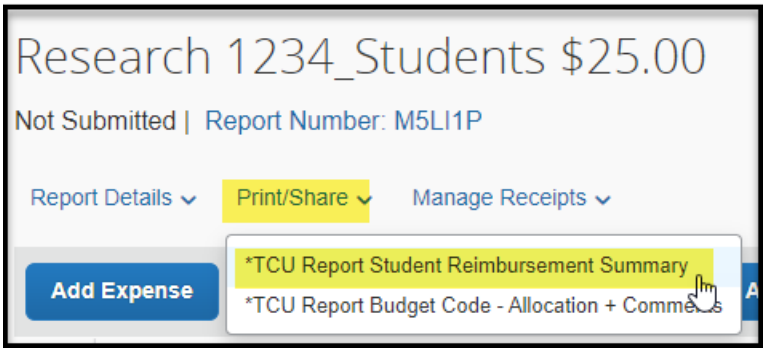
4. Once the header is complete, select **CREATE REPORT**
5. Select **ADD EXPENSE** and then select the appropriate expense type.
    - Specifically for Student reimbursements –
        - Traveler Type / Payee must always be “Student”
        - Payment Type must always be “Student Reimbursement”
    - 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.



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.

7. 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.



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