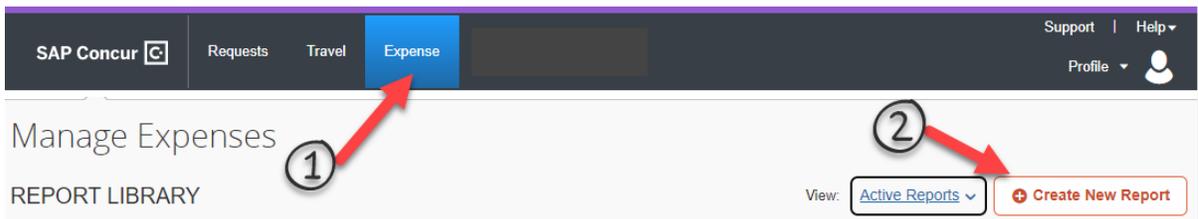


Creating and Submitting a Reimbursement for a TCU Student

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:

Report Header
test student | \$0.00

Report Type *
*TCU Student Reimbursements

Report Name * ?
Research 1234_Students

Report Start Date *
05/01/2023

Report End Date *
05/06/2023

Payee / Traveler Type *
Student

Business Unit *
(BRITE) Brite Divinity School

Fund *
(10200) Brite General

Department *
(12000) Brite General

Project

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.

New Expense Cancel **Save Expense**

Details Itemizations Hide Receipt

Allocate * Required field

Expense Type *
Parking

Transaction Date *
05/02/2023

Business / Trip Purpose *
Cooperative Extension

Report / Trip Type *
None Selected

Student Payee *
(110422618) Smith Aaron

Traveler Type / Payee *
Student

Payment Type *
Student Reimbursement

Supplier *
ABC Lots

Amount *
25.00

Currency *
US, Dollar

Comment

RECEIPT No. 123456

DATE _____ \$ _____

FROM _____ DOLLARS

FOR RENT
 FOR _____

ACCT. _____ PAID _____ DUE _____

CASH
 CHECK
 MONEY ORDER
 CREDIT CARD

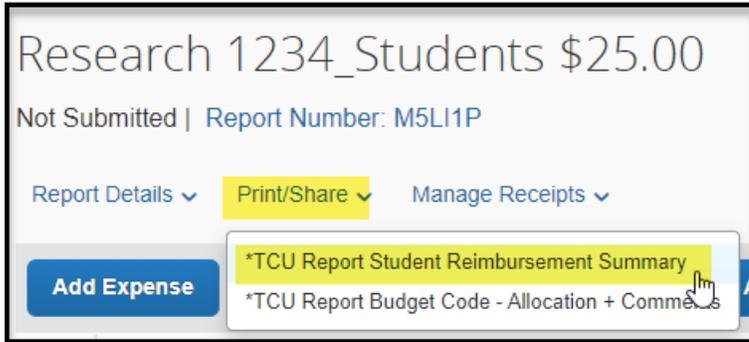
FROM _____ TO _____ BY _____

A-2501
T-46820

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.