**Concur Expense Reporting**

* Non-travel expense reporting for both SMU Cards (pCards) and personal reimbursement of business expenses will be processed through Concur effective June 20, 2015.
* Non-travel expenses are reported in much the same way as Travel, except they are processed through the “Expense Policy” Report Type rather than the “Travel Policy” Report Type. Users will see different fields in “Expense Policy” than they see in “Travel Policy”. Required fields have a red bar on the left side of the response box. Differences between travel and expense that merit mention include:
  + A “Travel Allowance” pop up for per diem allowances occurs when the user submits the report just as it does when reporting under “Travel Policy”. Always answer “No” when filing under the “Expense Policy”.
  + Expense Types in “Expense Policy” are different from those in “Travel Policy”. Users should choose the expense type that most closely matches the expense being reported. If there is not a code that seems to fit, contact the administrator at 8-4151.
  + Receipts must be attached to all SMU Card expenses and reimbursement requests when submitting reports in “Expense Policy” except mileage reimbursement and personal expenses that must be reimbursed to the University.
  + Purchasers must settle SMU Card purchases every month, but no more than one report including **both** **SMU Card settlements** **and** **expense reimbursement** is permitted (via an “Expense” report in Concur). Exceptions to settlement more than once per month may be made at fiscal yearend when yearend processes may dictate otherwise.
  + Individuals who do not also have SMU Card expenses may file reports no more frequently than monthly, but do not have to file every month (especially if the dollar amount does not warrant it). All personally paid business expenses, regardless of amount, but must be filed at least annually to ensure the reimbursements are made in the fiscal year in which the expenses were incurred. SMU’s fiscal year ends in May.
* Employees requesting reimbursement for business expenses must have a bank account set up in Accounts Payable for mandatory direct deposit (for both travel and expense).
* For further information regarding Concur Expense, including policies, a training guide, log in access and other information, go to the expense website at smu.edu/expense.