How to Submit a Reimbursement Request

All Sport Club Reimbursement Requests:

- MUST be submitted through Concur
- MUST have a receipt to justify the expense
- Must be submitted with correct Department Number, Fund Code, and Program Code for the team and expense. Available from each team’s Treasurer/President
- For travel must be submitted within 5 business days of returning to campus
- For non-travel expenses must be submitted within 15 days of purchase

Expense Reports in Concur should be submitted for each trip or type of travel you or your club is taking. Be aware that any expenses approved 60+ days from when they were incurred may be subject to IRS policies on income.

Expense Reports are able to hold multiple expenses and Expense Types. Please only submit one Expense Report if there are multiple expenses for a single trip or type of travel.

To request reimbursement for Sport Club related expenses, first you must log in to Concur through the Princeton Travel Management Website Click on the Concur logo and log in using your Princeton University NetID and password. All reimbursement requests must be submitted as Expense Reports through Concur. Submission by any other method is not acceptable and will result in a delay in reimbursement.

Before you begin the Sport Club Expense Report process, you must check that your Expense Approver is saved as the Assistant Director for Sport Clubs. To do that, on the top right of the screen under Profile-Profile Settings, click Expense Approvers in the left-hand column. Enter the correct NetID of the Assistant Director of Campus Recreation for Sport Clubs as the Default Approver for your Expense Reports and click Save.

After verifying that the Expense Approver is correct, under Expense on the top menu, select Create New Report
This will take you to a screen to create a New Expense Report. To submit an Expense Report for reimbursement to the Sport Club office, there are 7 fields that must be completed on this page.

- Report Name (Team name, trip or reason for expense)
- Report Date
- Report Type
- Business Purpose
- Department
- Fund
- Program

After these 7 fields have been completed, click the Next button on the bottom right corner of the screen. It will take you to the Expense Report screen.

To add an individual expense to the Expense Report, on the right side of the screen there will be a list of All Expense Types. Select the correct type of expense you are being reimbursed for. To add additional Expenses click on New Expense on the left of the screen.
Note to all students completing Expense Reports:

- If you drove a rental vehicle, you **MUST** use *Car Rental Fuel* for gas costs
- If you were driving a personal vehicle you **MUST** use *Mileage – Personal Car* to be reimbursed for the trip
- *Miscellaneous* is **NOT** an acceptable Expense Type. Reports will be returned for any Miscellaneous Expense Types.
- Any meals must be approved prior to travel and itemized receipts for meals are required
- Equipment should be classified as Project Materials

Expense Types have required fields. Examples of required fields in an Expense Type are:

- Transaction Date
- Business Purpose
- Amount of Expense

Expense Reports are able to hold multiple expense types and multiple expenses for each expense type. Please make sure to submit only one Report for a specific trip or type of travel within the timeframes required by Sport Clubs.
Once you have created the Expense in the Expense Report, if the Expense is above $50 there will be a red exclamation point icon reminding that a receipt is required. It will be accompanied by a yellow piece of paper icon. As a reminder, receipts are required for all expenses, with the lone exception being for personal mileage. Below you will see an example of two Expenses, one with a red and yellow icon, and one without any icons. The difference is that one expense is above $50, the other is below.

To attach a receipt to an expense, it must first be uploaded to Concur in electronic form. This can be done through the Concur App or through your browser while logged in to Concur. On the right side of the Expense Report Screen is a link, Available Receipts. Clicking on that brings up a screen that allows you to view receipts you have already uploaded, or upload another receipt.
When you have an Expense selected in the left hand column, and have opened Available Receipts the screen will look like this:

The Green Arrow icon that is above the receipt will allow you to attach it to the Expense. Once the correct receipt has been attached to the Expense, it will disappear from the right side of the screen, the Yellow Icon on the left will change to a blue icon and the red icon will disappear. For Sub-$50 expenses, the blue icon will appear, as it has for the Project Materials Expense. The resulting screen will look like this:

If you have no more expenses to add to this Expense Report, there is one more step before submission. Allocating the expenses using the correct Department, Fund, and Program is important to ensure the correct information is being submitted.

To allocate the expenses, select all of the expenses on the left of the screen, and under the Details dropdown select Allocations.
A window will pop up within your browser with the Department, Fund, and Program that you entered correctly when you created the Expense Report. Click Save at the bottom right, and close the pop-up window.

After allocation, an additional blue icon will appear next to the allocated expenses in the column on your left.

You may now click the orange **Submit Report** on the top right of the screen to submit your expense report for approval and Reimbursement.