

## FINANCE ANNOUNCES CHANGES TO ORIGINAL RECEIPT SUBMISSION REQUIREMENTS FOR CONCUR EXPENSE CLAIMS

January, 2016

In the summer of 2014 the Finance department introduced Concur Expense (York's electronic expense reporting system). We are pleased to report that over 85% of faculty claims and 95% of staff claims are currently being submitted and processed through Concur.

As part of our ongoing efforts to improve services to faculty and staff and to streamline processes, Finance continues to pursue opportunities to improve the configuration and design of the Concur system.

Some of the changes that have been made or are in progress include:

1. The frequency of direct deposit payments for expense claims has increased, from two to three times per week.
2. A review is currently in progress to further streamline the approval process.

Today, we are announcing a further efficiency. The University has investigated the technical requirements of both the Canada Revenue Agency and the Federal Tri Council Agencies, to accept electronic receipts. This technical review and evaluation by an external expert has now been completed and the University has met the standard to eliminate the requirement to retain paper receipts when they are stored electronically in the Concur Expense System.

***Effective immediately, faculty and staff who submit expense claims in Concur are no longer required to send their original receipts to Finance.***

Original receipts will still be required for expense claims submitted using the manual (or paper) forms.

For further details on the new receipt submission guidelines, please refer to the chart below:

Claim type	How to attach your receipts with your claim	What to do with original receipts after your claim is approved
<b>Concur expense claims</b>	<ol style="list-style-type: none"> <li>1. Capture images of your receipts using your smartphone or scanner and store them on your hard drive or the Concur receipt store. Ensure (or verify) quality of image.</li> <li>2. Attach receipt images to line items in Concur expense claim.</li> <li>3. Submit claim electronically for approval and processing.</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Retain original receipts for 90 days</b> from the date your claim is approved for payment.</li> <li>2. <b>Discard original receipts 90 days after your claim is approved.</b></li> </ol>

<b>Manual (or paper) claims</b>	<ol style="list-style-type: none"><li>1. Make copies of all original receipts for your reference (or in case original receipts are lost in transit or become detached from your claim).</li><li>2. Staple original receipts to manual claim form.</li><li>3. Manually submit claim for approval.</li></ol>	Send approved claim <b>with original receipts</b> to Finance Department by internal mail.  For external mail, send to: York University Finance Department 4700 Keele Street, Toronto, ON, M3J 1P3
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**IMPORTANT:** For information regarding acceptable receipts refer to the [Receipt Guidelines for Concur Expense Reports](#).

**Advantages of using Concur:**

- No need to walk the expense report to your approver
- No need to retain copies of your expense report or receipts
- Automated calculations for foreign exchange, accounts, mileage, and HST rebates
- Access your expense report and check its status at any time
- Faster payment
- Expense reports can be filed from home or remotely
- Environmentally friendly!!!
- No lost claims!!!

Click [here](#) to access your Concur account and file your claim!

Any questions on this procedure can be directed to Charlene Lin ([linchun@yorku.ca](mailto:linchun@yorku.ca); ext 44684).