# Concur Expense
## Approval Cheat Sheet

### Due Dates
- Reconcile company card charges by the 1st business day of the month

- Approve charges by the 3rd of the month

- Expense reports can be submitted at any time buy as frequently as is reasonable.

### Billing Cycle
Calendar month
(1st day of the month – last day of the month)

### Contact Information
Tracy Dip, Disbursement Services Assistant. x5977 or **tdip@usfca.edu**

Dennis Miller, Director of Disbursements x2102 or **millerd@usfca.edu** or **pcard@usfca.edu**

### Log on to Concur
- Login to **MyUSF**
- Select Concur on the top of the screen.
  **OR**
**http://expense.usfca.edu**
- Logon on with your MyUSF ID (case sensitive)
- Type password (first logon is your 8-digit CWID #)

### Option One: Approving/Rejecting a Travel Cash Advance

1. From the Concur home page, click the Cash Advance request you want to review under the Approval Queue task pane.
2. Once you have viewed the details, you can click Approve or Reject. Be sure to put in notes as to why it has been rejected.
3. Fields that are required:
    a. Start and End date of the trip
    b. Business purpose of cash advance
    c. Funds will automatically be direct deposited into the users account unless otherwise instructed. Funds can also be issued in cash during the cashier window hours of 10am-1pm Monday through Friday.

### Option Two: Approving/Sending Back Expense Reports

1. From the Concur homepage, select the Requires Approval button under **My Tasks.** Then click the report you want to review.

2. To view the digital receipts, click View Receipts at the top right.

3. To view more transaction details, click on the individual expense types.

4. Individual comments may be typed.

5. From Report List, you can click

    (A) Approve (for the whole report) or

    (B) Send Back to Employee (for the whole report) if you want them to mark some as a personal expense.

5. To send to additional approver please select Details then approval flow. Select the arrow pointing down and type in a name. Select the Approve button and it will be sent to the additional approver indicated.