Reimbursements

Students

All students must use the Reimbursement Expense Worksheet (REW) for all non-taxable reimbursements processed via Concur. Students should log in at Student Service Online and confirm their name and address information is correct before completing the REW.

Submit the REW, appropriate receipts, and support documentation to chembusinessoffice@columbia.edu, Subject Line: Concur Student Reimbursement, and copy your PI. Send all receipts and statements as individual PDF files.

Please familiarize yourself with the updated University's Travel and Business Expense policies, including the information regarding policy exceptions.

When requesting a reimbursement please complete the REW, see information below that will help you to complete the form.

1. Vendor type - select Student, Non-Employee.
2. Type of report - select CU, Non-Profiled payee.
3. Report name - field to help identify expense report ex/ membership renewal.
4. Report purpose - select the best option available
5. Detailed Business Purpose - The business purpose must be specific enough that a third-party reviewer can understand it. "Dinner with donor to discuss alumni event ideas" is an appropriately documented business purpose. "Dinner with donor" is not. The business purpose of an expense may be obvious to the Payee, but not to a third-party reviewer.
6. Expense line - (please note that you must add a line for each receipt) Select the best option to describe expense, enter the receipt date, amount of receipt, and comment justification.
7. Detailed receipts must be included showing a form of payment with the supporting documentation (bank or credit card statement). Please redact all sensitive information. Only reveal the last four digits of the credit card used and the expense. If the receipt shows a form of payment and amount due $0.00 then a bank or credit card statement is not required.
8. Conferences - Documentation such as a brochure or itinerary is required to justify expenses associated with attending a conference.
9. Enter the chart string (funding source) information, if available.

If you have any further questions, please feel free to reach out to the Chemistry Business Office by email at chembusinessoffice@columbia.edu Subject Line: Concur Student Reimbursement

Faculty and Employees

All Faculty and Staff will have to submit their expense reimbursements through Concur. Follow the steps below.

Getting started:
To log into Concur, go to the Travel and Expense Portal. The portal provides valuable travel and expense-related information and guidance, as well as links to job aids to help you get started.

It is highly recommended that you review the Concur Travel and Expense Training and the updated Travel and Business Expense Policies. All expenses should be submitted within the fiscal year of the transaction date. Failure to submit within 365 days will result in non-reimbursement of expenses. As always, we recommend that you submit your reimbursement requests within 10 days of the expense and no later than 120 days. Reimbursements submitted more than 120 days after the date of the expense, require Payee Justification and Financial Approval. The Executive Director of AP will review and determine if imputed income applies.

-The first thing you should do is set up your Concur profile. Refer to the Setting Up Your Concur Profile for Travel and Expense Users You will need to set up your Administrative Department to 4042102 and chart string in your Concur Profile Expense default settings.

All expenses will be allocated to your default chart string. If you wish to allocate an expense to a different project, please add the information in the comments section so we can update the chart string for the specific transaction at the time of approval.

CREATE A NEW REPORT:

1. Log in to Concur https://travel-expense.finance.columbia.edu/ and click the Expense Tab.
2. Click Create New Report - screen appears.
3. Select the Type of Report - business or travel.
4. Enter the Report Name - it could be anything to help you identify the report.
5. Select Report Purpose - Enter Detailed Business Purpose. All expenses must be for a valid business purpose that is necessary and reasonable in order to conduct University business. Business purpose must be specific enough that a third-party reviewer can understand it. “Dinner with donor to discuss alumni event ideas” is an appropriately documented business purpose. “Dinner with donor” is not. The business purpose of an expense may be obvious to the Payee, but not to a third-party reviewer.
6. Click Create Report (it should take you to the Adding Expense page) Note: You must enter an expense line for each receipt and the date of the receipt should match

the expense date on the report. Conferences - Documentation such as a brochure or itinerary is required to justify expenses associated with attending the conference.

7. Click Add Expense-the window appears and you will have to select from the available expenses
8. Complete all the necessary fields including attendees and itemization if required (group meals require attendees and itemization).
9. Attach any required receipts or documentation including proof of payment and PI's approval.
10. Click Save and add another line if necessary if not then after adding all the Expense Items to your report click Submit Report
11. The User electronic appears and you will need to click Accept & Continue, select Felix Sanchez as Initial Reviewer, and then Submit.