

How To Get Reimbursed for a Club Sport Expense

If you're a Columbia University student with access to Concur

Step 1: Log into Concur with UNI and password



Step 2: Select Expense Tab

Step 3: Select Create New Report



Step 4: Depending on what expense(s) your requesting to get reimbursed for.

• Under the field "Type of Report" select either CU Business Expenses or CU Travel Expenses

Enter the below Club Sports information in the required fields when creating a New Report to get reimbursed for a Club Sport expense.

Type of	f Report *	School *	School *			* Required f	
*CU Business Expenses ~		~) (T ~	T v ATH Athletics (050000X)			ATH Physical Education (05PE00X)	
Sub-Div	vision *	3 Admin De	Admin Department *				
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- For "Report Purpose" field select the most appropriate option related to the expense. If one is not relatable select "Other Business Expenses"
- For Report Name, Detailed Business Purpose and Comment fields input very detailed information related to the expense(s).
- For "Segment" field search as text and enter "ATH Club" your Club Sport Name

(example ATH Club Badminton)

Segment *	r
▼ ~	Search by Text
Text	
Code	
Either	
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• Leave "Site" field blank.

Step 5: After entering information into the fields select "Create Report"

Step 6: Select Add Expense. The Add Expense window appears

• Select "Create New Expense"

Available Expenses + Create New Expense Search for an expense type ^02. Transportation Car Rental Car Rental Car Rental Fuel Carpool Reimbursement Charter Bus Ground Transportation Group Booking Deposit / Fee Parking Personal Car Mileage Tolis	Add Expense		X
Search for an expense type	0 Available Expenses	+ Create New Expense	
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Ground Transportation Group Booking Deposit / Fee Parking Personal Car Mileage Tolls	Charter Bus		
Group Booking Deposit / Fee Parking Personal Car Mileage	Ground Trans	portation	
Parking Personal Car Mileage	Group Bookin	g Deposit / Fee	
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• Search and select the Expense Type. The Expense Details screen appears

Details Itemization	ns				Hide Receipt
Allocate		* Re	quired field		
xpense Type *					
Individual Meal - Lunch			~		
ransaction Date *		Purpose *			
MM/DD/YYYY		Meetings/Events	~		
/as alcohol purchased?*		Payment Type *			
None Selected	~	Cash/Personal Credit Card	~		
mount *		Currency *			
		US, Dollar	~		
omment/Justification				Attach Receipt Image	

• Complete all the required fields and attach any required receipts or proof of payment documentation.

Step 7: Click **Save and Add Another** to save and add another Expense Item to your Expense Report or click **Save Expense** to save and return to your Expense Report list.

Step 8: After adding all the Expense Items to your Expense Report, click **Submit Report.** The User Electronic Agreement appears.

Step 9: When asked to enter name of Initial Reviewer enter "Brian Jines"

Step 10: Click Accept & Continue on the User Electronic Agreement and then Submit.

If you're a Barnard College student

Step 1: In an email provide Brian Jines the following information:

- a. Your home mailing address, phone number and email address.
- b. Provide the Overall Business Purpose detailing the reason for the club expenses.
- c. Provide all receipts. If you paid for any expenses using your credit card or debit card provide credit card statements that show the expense charged to your card.

Step 2: Fill out a <u>W9 form</u> and send a copy to <u>Brian Jines</u>. This is required to set you up as a vendor in the University Accounts Payable department.

Note: You must be set up as a vendor in order to be reimbursed. With this information we will be able to submit a Check Request Form to the Accounts Payable Department requesting a check be created in your name.