



Concur Quick Start Guide

Instructions to create employee
expense reports

Kindred Healthcare



HOME SCREEN

The screenshot shows the Concur Home Screen for a user named Joshua. The interface includes a navigation bar at the top with tabs for Home, Travel, Expenses, Approvals, Reporting, and App Center. Below the navigation bar is a Quick Task Bar with buttons for '+ Start a Report', '+ Upload Receipts', '00 Required Approvals', '00 View Trips', '02 Available Expenses', and '00 Open Reports'. The main content area is divided into several sections: TRIP SEARCH, COMPANY NOTES, MY TASKS, and FACTS & STATS. The MY TASKS section shows three task cards: 'Required Approvals' (00), 'Available Expenses' (02), and 'Open Reports' (00). The FACTS & STATS section shows '0 Out of Policy' and '1 TRIPS'. The bottom of the screen features the Concur logo and a footer with copyright information.

User Profile – quick access to your profile or other traveler profiles (if you are a travel arranger)

Quick Task Bar – easy and fast access to the most important user tasks currently assigned to your account. To start a new expense report, click the “+ Start a Report” button.

Company Notes – condensed to provide easy viewing of other screen components. Click *Read More* to see full company and travel notes.

My Tasks – provides quick access to most important tasks such as viewing open reports.

Facts & Stats – Let’s you track your personal stats and read helpful hints about using Concur.

Concur log in page: <https://www.concursolutions.com>

New expense users must complete and submit the AP Direct Deposit form for access. **No notice** will be sent that you have been set up in Concur. You must use “@kndte” at the end of your Kindred Domain ID to create your user name when logging in. First time users will use “welcome” as their password, **all lower case**. Your login ID will follow the format of **KindredDomainID@KNDTE** (ex: doe@kndte). If you do not know this ID or need the form, please contact us at APTravelCorp@kindred.com.

You must set up your Concur Expense email account to receive notifications from Concur regarding the status of your expense report, including notification of a returned report or expense line item. To complete your Expense email set up, go to the Profile tab, Profile Settings, Expense Information, and then enter your email address and click Save.

The main page is called Concur. **This is where important information regarding Concur will be posted.** Choose *Read more* under Company Notes to access Concur interactive training links and additional company information. The Quick Task Bar at the top of the Concur page provides quick access to important tasks, including the choice to start an expense report. Near the bottom of the page,

you can view *My Tasks*. Listings of available expenses and open reports can be found in *My Tasks*. Approvers will also see a list of reports requiring approval.

Once you have been set up to create expense reports in Concur, Start a Report will be a choice on the Quick Task Bar. Choose this option to go directly to a new expense report. The **Expense** tab will also appear when you are set up to use Concur for expense reimbursements. Use the Expense tab option to create a new report, view open reports, upload or view receipts.

The screenshot shows the 'Create a New Expense Report' form in the Concur system. The form is titled 'Create a New Expense Report' and has a 'Report Header' section. The fields are as follows:

- Report Name**: A text input field with a bold red line at the front.
- Policy Name**: A dropdown menu with 'RehabCare Expense Polic' selected.
- Facility**: A dropdown menu with '(4699) Facility CORP-SU' selected.
- Department**: A dropdown menu with '(993) Dept CORP-ACCO' selected.
- Business Purpose**: A text input field with a bold red line at the front.
- Comment**: A text input field.
- Company**: A dropdown menu with '(2320) Company Kindred' selected.
- Exceptions**: A checkbox.
- Processor**: A dropdown menu.

Type in your **Report Name** and **Business Purpose**; these help the approver, processors and auditors understand the business reason for the expenses. If you need to provide more information about your expense report, please use the **Comment** field.

In Concur, required fields are marked with a bold red line at the front of the field. You will not be able to advance in the system without completing these fields.

Some fields are defaulted. **Policy Name does not need to be changed.** The **Company, Facility, and Department** fields are defaulted to your home cost center.

Once the **Report Name** and **Business Purpose** fields are completed, click **Next** to advance.



Test

Delete Report Submit Report

+ New Expense + Quick Expenses [Import](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses [Move](#) [Delete](#) [Copy](#) [View](#)

| <input type="checkbox"/> | Date | Expense | Amount | Requested |
|--------------------------|------|---------|--------|-----------|
| Adding New Expense | | | | |

[Receipt Store](#)

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✔ **Recently Used Expense Types**

- Gifts Cards/non-perishables - employees
- Mileage
- Room rate/Lodging

All Expense Types

Business Promotions

- Trade Shows/Conferences, not CEU

Business/Office Expenses

- Copies/Printing self - service
- Fingerprinting/Background checks
- Office Supplies
- Postage USPS
- Printing Service
- Shipping - UPS/Federal Express

Communications

- Cellular Phone
- Fax line or long distance only phone line
- Local Phone
- Online/Internet fees

Employee Benefits

- Employee Relations
- Gifts Cards/non-perishables - employees
- Member Dues & Other Subscriptions

| | |
|--------------|-----------------|
| TOTAL AMOUNT | TOTAL REQUESTED |
| \$0.00 | \$0.00 |

Here you will select your expense type from the list on the right of your screen. To locate your expense type, you can scroll down the list or start typing the expense type name in the **Expense** field.

The screenshot shows the 'New Expense' form in the Concur Expense Processor. The form is titled 'View Reimbursement Rates' and contains the following fields:

- Expense Type:** Mileage (dropdown)
- Transaction Date:** 11/10/2014 (calendar icon)
- From Location (Required field):** (empty text box)
- To Location:** (empty text box)
- Payment Type:** Cash/Personal Credit Card (dropdown)
- Facility:** (4699) Facility CORP-SU (dropdown)
- Department:** (993) Dept CORP-ACCO (dropdown)
- Purpose of trip:** Patient Therapy (text box)
- Distance : Amount:** 0 : 0.00 (text boxes) USD (dropdown)
- Company:** (2320) Company Kindred (dropdown)
- Personal Expense (do not reimburse)

At the bottom of the form, there are buttons for **Save**, **Allocate**, **Attach Receipt**, and **Cancel**. A **Mileage Calculator** link is also present. The left sidebar shows an 'Expenses' table with the header 'Adding New Expense' and 'No Expenses Found'.

The **Purpose of trip** field is defaulted to the **Business Purpose** you entered when first creating the report. **This field can be changed for each line item, if the business purpose is different.**

Once the entry has been completed, click **Save**.

CONCUR Expense Approvals App Center Administration | Help Profile

Manage Expenses Processor

Test

[+ New Expense](#)
[+ Quick Expenses](#)
[Import](#)
[Details](#)
[Receipts](#)
[Print / Email](#)
[Delete Report](#)
[Submit Report](#)
[Hide Exceptions](#)

| Expense | Date | Amount | Exception |
|-------------------|------------|---------|---|
| Mileage | 11/10/2014 | \$25.00 | ⚠ Dates of travel must be provided. Make sure that you have deducted your normal commute mileage from your total mileage claim. |
| Gifts Cards/no... | 11/10/2014 | \$50.00 | ⚠ You must include the recipient's name, reporting facility and dollar value received by each employee in the attendee list. In the expense's comment box, include the reason for the gift. |

| Expenses | Date | Expense | Amount | Requested |
|-------------------------------------|------------|--|----------|-----------|
| <input type="checkbox"/> | 11/10/2014 | Mileage | \$25.00 | \$25.00 |
| <input type="checkbox"/> | 11/10/2014 | Gifts Cards/non-perishables - en Walmart, Jefferson, Indiana | \$50.00 | \$50.00 |
| <input checked="" type="checkbox"/> | 11/10/2014 | Advertising - Help wanted Commercial, Jefferson, Indiana | \$100.00 | \$100.00 |

TOTAL AMOUNT \$175.00 TOTAL REQUESTED \$175.00

Expense

Expense Type: Advertising - Help wanted

Transaction Date: 11/10/2014

City, State: Jefferson, Indiana

Payment Type: Cash/Personal Credit Card

Personal Expense (do not reimburse):

Facility: (4699) Facility CORP-SU

Department: (993) Dept CORP-ACCOI

Enter Vendor Name: Commercial

Amount: 100.00 USD

Company: (2320) Company Kindred

Business Purpose: Recruiting

[Save](#)
[Itemize](#)
[Allocate](#)
[Attach Receipt](#)
[Cancel](#)

Any line item that has the gold circle with exclamation mark in it must have a receipt attached to the report before you can submit it. All expenses require an itemized **receipt** verifying purchase. Credit card/bank statements alone are not adequate documentation for reimbursement. They can be attached to verify payment, but the receipt detailing the purchase is also required. Credit card statements or cancelled checks need to be attached when using a hand-written or a generic type of receipt. Your name and the purchase line must be part of the statement but other personal information can be blacked out. **Individual meals using the actual method and all business meals require an itemized receipt to be attached. Please Note: If the meal is under \$5, the gold circle with an exclamation point will not appear on that line item, but a receipt is still required for reimbursement. The receipt requirement does not apply to individual meals if your division uses the per diem method for meal reimbursement.** Documentation of an overnight stay will act as your per diem meal receipt. To attach receipts, you will need to print off the **RehabCare Fax Receipt Cover Page**. This is located under the **Print** tab.

CONCUR Expense Approvals App Center Administration | Help Profile

Manage Expenses Processor

Test

[+ New Expense](#)
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[Import](#)
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[Receipts](#)
[Print / Email](#)
[Delete Report](#)
[Submit Report](#)
[Hide Exceptions](#)

Exceptions

| Expense | Date | Amount | Exception |
|-------------------|------------|---------|--|
| Mileage | 11/10/2014 | \$25.00 | ⚠ Dates of travel must be deducted your normal commute mileage from your total mileage claim. |
| Gifts Cards/no... | 11/10/2014 | \$50.00 | ⚠ You must include the dollar value received by each employee in the attendee list. In the expense's comment box, include the reason for the gift. |

Expenses [Move](#) [Delete](#) [Copy](#) [View](#)

Adding New Expense

| <input type="checkbox"/> | Date | Expense | Amount | Requested |
|--------------------------|------------|--|----------|-----------|
| <input type="checkbox"/> | 11/10/2014 | Mileage | \$25.00 | \$25.00 |
| <input type="checkbox"/> | 11/10/2014 | Gifts Cards/non-perishables - en Walmart, Jefferson, Indiana | \$50.00 | \$50.00 |
| <input type="checkbox"/> | 11/10/2014 | Advertising - Help wanted Commercial, Jefferson, Indiana | \$100.00 | \$100.00 |

TOTAL AMOUNT \$175.00 **TOTAL REQUESTED** \$175.00

New Expense [Receipt Store](#)

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Advertising - Help wanted
- Gifts Cards/non-perishables - employees
- Mileage
- Room rate/Lodging

All Expense Types

Business Promotions

- Trade Shows/Conferences, not CEU

Business/Office Expenses

- Copies/Printing self - service
- Fingerprinting/Background checks
- Office Supplies
- Postage USPS
- Printing Service
- Shipping - UPS/Federal Express

Communications

- Cellular Phone
- Fax line or long distance only phone line
- Local Phone

Check to make sure your receipts have attached to your report before you submit it. Go to the **Receipts** drop down box and choose **Check Receipts**. It may take a few minutes for your receipts to attach to your report. If your receipts are attached, they will appear in the page that pops up. If they are not attached wait a few more minutes and check them again; you may also have to try faxing the receipts a second time if they do not appear after an hour. To submit the report, click the **Submit Report** button on the top, right side of the screen. Your report will then be sent to your approver along with an email notifying them that they have expenses to approve.

Using Itineraries to Create Expense Reports

The image shows two methods for creating an expense report from a trip in the Concur system. On the left, a screenshot of the 'TRIPS (3)' section shows a dropdown menu for a trip from Dallas to Indianapolis. The 'Expense this trip' option is circled in red. A callout bubble points to this option with the text: 'Choose more from the trip section on the homepage then choose Expense this trip to create an expense report from your recent travel.' A green arrow labeled 'OR' points to the right. On the right, a screenshot of the 'CONCUR Travel Expense' homepage shows the 'Travel' tab selected. A callout bubble points to the 'Expense' link in the 'Action' column of the trip list with the text: 'Choose the expense action to create an expense report from your recent trip.'

TRIPS (3)

NOV 18-21 Trip from Dallas to Indianapolis

More

Status

Needs Expense Report

Ticketed

Expense this trip

Cancel this trip

isville

24-25

OR

Choose the Travel Tab to go to the Travel page.

CONCUR Travel Expense

Travel Trip Library Templates Tools

Travel Alerts

You haven't signed up to receive e-receipts. Sign up here

You have unused tickets

Company Notes Upcoming Trips Remove Trips

| Trip Name/Description | Status | Start Date | End Date | Action |
|--|-------------------------------|------------|------------|---------|
| Trip from Houston to Louisville (2ALWNO) | Needs Expense Report Ticketed | 05/18/2014 | 05/21/2014 | Expense |
| Trip from Louisville to Dallas (APJSCR) | Needs Expense Report Ticketed | 05/21/2014 | 05/22/2014 | Expense |

If travel has been booked in Concur, the itinerary can be used to create an expense report. By choosing one of the options shown above, the itinerary information (airfare, car rental, hotel) will create a new expense report for you with the expenses from the itinerary listed. For example, if you have car rental and airfare in the itinerary, the **Airfare** expense and **Rental Car** expense will be imported into the new expense report along with the itinerary information. If you have signed up for **E-receipts** and there is an **E-receipt** available for the expense, it will attach to the expense as well, thus saving time on attaching receipts for these items. If **E-receipts** are available for hotel expenses, they can be imported into the report and the system will **automatically itemize** the hotel expense. Verify the **Payment Type** for **Airfare** booked through Concur is **Company Paid**. The itinerary will create the expense for you.

Itemizing

ADH Meeting

[+ New Expense](#) [+ Quick Expenses](#) [Import](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses [Move](#) [Delete](#) [Copy](#) [View](#) <<

| <input type="checkbox"/> | Date | Expense | Amount | Requested |
|---------------------------|------------|---|---------|-----------------|
| <i>Adding New Expense</i> | | | | |
| <input type="checkbox"/> | 12/02/2014 | Office Supplies Target, Washington, North Carolin | \$86.37 | \$79.29 |
| <input type="checkbox"/> | 12/02/2014 | Office Supplies | \$54.20 | \$54.20 |
| <input type="checkbox"/> | 12/02/2014 | Miscellaneous | \$7.08 | \$0.00 |
| <input type="checkbox"/> | 12/02/2014 | Employee's individual meals | \$25.09 | \$25.09 |
| TOTAL AMOUNT | | | | TOTAL REQUESTED |
| \$86.37 | | | | \$79.29 |

Some expenses may need to be itemized. Choose the **Itemize** button on the bottom, right side of the screen once you have completed the vendor, date, and cost information for an expense.

Itemization should be used for any receipt that includes items which fall into various expense types. Itemization can also be used for partial reimbursement of a receipt. Always start with the full dollar amount of the receipt as your main expense type. Please note itemization is required for hotel expenses and used frequently to separate the food expense from the alcohol expense in meals as alcohol must be charged to a separate account.

Itemize the expenses on your receipt to the appropriate expense type. A receipt may contain office supplies, postage, and employee relations. The full dollar amount of the receipt is included as your main expense type. The expense line is then itemized out to reflect the three expense types purchased on the one receipt.

If a pack of gum or other personal item is included on the receipt, itemize this item out to **Miscellaneous** and check **Personal Expense (do not reimburse)**. The itemization marked personal will not be reimbursed.

Icons



This icon appears when something needs to be added or changed with the report or line item before it is allowed to be submitted.

Example:

| | | | |
|------------------|------------|----------|--|
| Room Tax | 01/03/2012 | \$3.00 | The Transaction Date is Greater than 60 days. Per the SOP you can not submit this entry for reimbursement. |
| Room rate/Lod... | 02/05/2012 | \$180.00 | The itemization amounts do not add up to the expense amount. |



This appears on expense items, \$5.00 and up, as a reminder that receipts are required.



This appears when the line item has an attendee list attached. If you put your cursor over this icon, the attendee list should appear.



This appears when the line item has an exception. These are warnings that inform you of what needs to be done with that expense before submission. These warnings are only informative and will stay on that line item. They will not prevent you from submitting the report.



This appears when the line item has been allocated to multiple facilities. If you put your cursor over this icon, the list of allocated facilities and how much is allocated to each facility should appear.



This icon appears to show that the report or line item has been sent back to the employee.



This appears when the line item or report has a comment attached to it.



This appears on a line item that has been designated a **Personal Expense**. The line item will not be reimbursed.



When this appears, you can put your cursor over the icon and the receipt attached to the line item should appear.



This appears when the line item has been uploaded from a credit card statement.



This icon appears when you have an E-receipt attached to that expense line item.

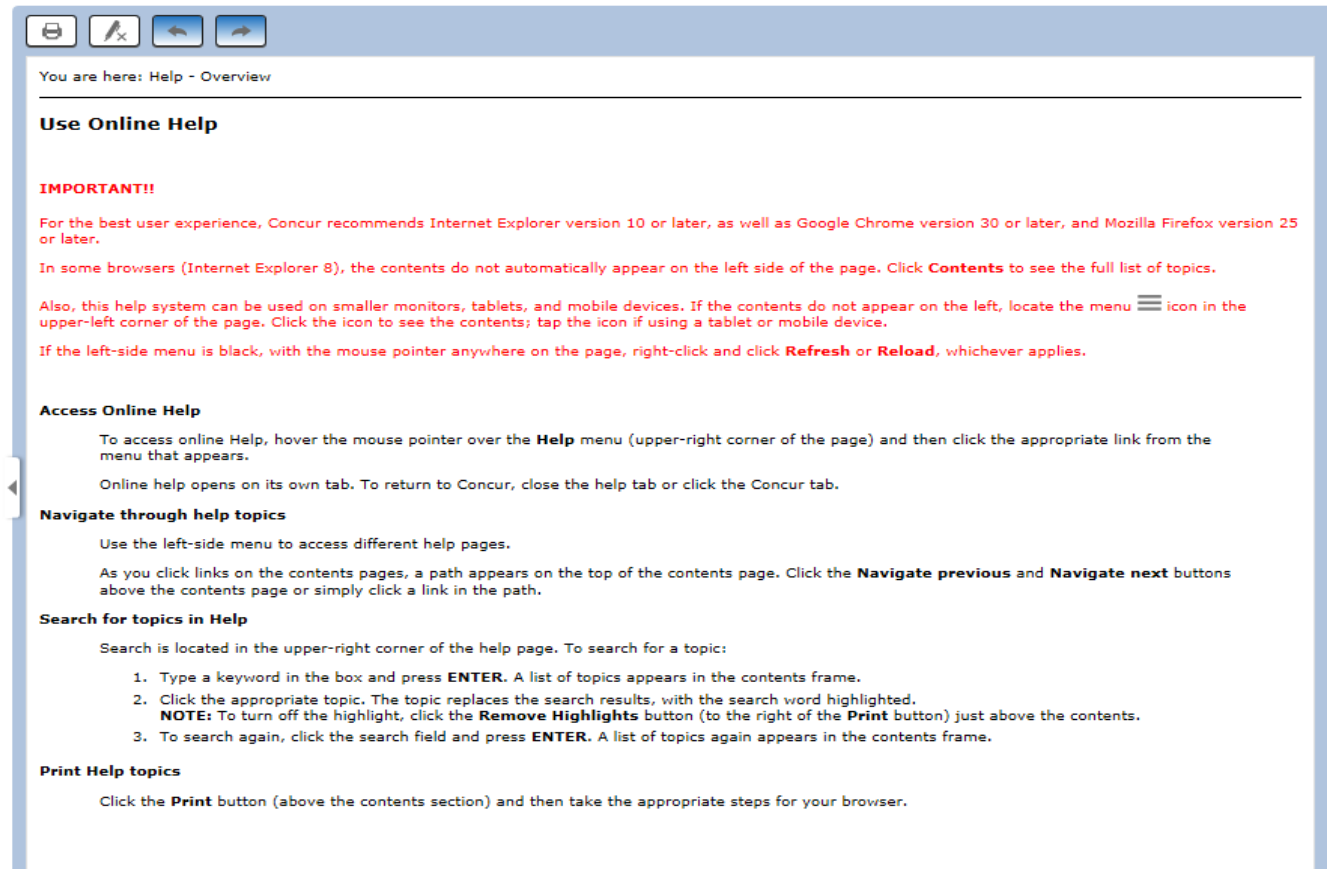


These icons appear when the Rental Car, Room Rate/Lodging, or Airfare expense has been created from the itinerary.

Questions

Contents

- Using Online Help
- Using Expense
- Profile & Preferences
- Process Receipts
- Processor
- Concur for Mobile
- TripIt Integration with Expense
- Training




You are here: Help - Overview

Use Online Help

IMPORTANT!!

For the best user experience, Concur recommends Internet Explorer version 10 or later, as well as Google Chrome version 30 or later, and Mozilla Firefox version 25 or later.

In some browsers (Internet Explorer 8), the contents do not automatically appear on the left side of the page. Click **Contents** to see the full list of topics.

Also, this help system can be used on smaller monitors, tablets, and mobile devices. If the contents do not appear on the left, locate the menu  icon in the upper-left corner of the page. Click the icon to see the contents; tap the icon if using a tablet or mobile device.

If the left-side menu is black, with the mouse pointer anywhere on the page, right-click and click **Refresh** or **Reload**, whichever applies.

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and then click the appropriate link from the menu that appears.

Online help opens on its own tab. To return to Concur, close the help tab or click the Concur tab.

Navigate through help topics

Use the left-side menu to access different help pages.

As you click links on the contents pages, a path appears on the top of the contents page. Click the **Navigate previous** and **Navigate next** buttons above the contents page or simply click a link in the path.

Search for topics in Help

Search is located in the upper-right corner of the help page. To search for a topic:

- Type a keyword in the box and press **ENTER**. A list of topics appears in the contents frame.
- Click the appropriate topic. The topic replaces the search results, with the search word highlighted.
NOTE: To turn off the highlight, click the **Remove Highlights** button (to the right of the **Print** button) just above the contents.
- To search again, click the search field and press **ENTER**. A list of topics again appears in the contents frame.

Print Help topics

Click the **Print** button (above the contents section) and then take the appropriate steps for your browser.

If you have questions about entering expense reports or using the mobile apps, the **Expense Help** section is available within Concur. The **New User Manual**, coming soon and available by request from APTravelCorp@Kindred.com provides more detailed instructions.

Password re-sets should be requested through your division's IS Support number, Option 3. Concur Expense assistance and password resets can also be requested via email to Aptravelcorp@kindred.com or call 877-798-6820 and choose option 7.

Expense Types

Trade Shows/Conferences, not CEU
Copies/Printing self - service
Fingerprinting/Background checks
Office Supplies
Postage USPS
Printing Service
Shipping - UPS/Federal Express
Cellular Phone
Fax line or long distance only phone line
Local Phone
Online/Internet fees – Other
Online/Internet fees – Home Office – Requires a CBA form filed in AP
Employee Relations
Gifts Cards/non-perishables – employees
Member Dues & Other Subscriptions*
Professional license renewal*
Seminars/Cont Ed/Training*
Service Awards
Room rate/Lodging
 Room Tax
Business meals - Employee & Non-employee
Business meals - Employee & Non-employee - Alcohol portion
Business meals - Employees only
Business meals - Employees only - Alcohol portion
Employee's individual meals
Employee's individual meals - Alcohol portion
Sporting events & outing with non-employees
Sporting events & outings - Employee only
Advertising - Help wanted
Career fair - external/Open House recruiting – internal
Marketing expenses/gifts - no meals

Meetings - Room & other expenses, no meals
Minor Equipment
Miscellaneous
Public relations/Community Events
Resident relations - Treats, meals, outings
Supplies - disposable items
Airfare baggage and change fees
Airfare ticket fees
Bus, Train, Subway, Shuttle
Chauffeured travel (Limo)
Gas (must also submit rental car doc)
Laundry - Personal for travel
Mileage
Parking
Rental Car
Taxi
Tolls
Travel Tips (help with bags, maid service)

* RehabCare employees with PCA accounts can not submit professional expenses through Concur. If you are seeking reimbursement for these types of expenditures, please check with your manager to see if you are eligible for a PCA account. If you are eligible or want more information on PCA accounts, please contact pca.help@kindred.com.

Lost/Stolen Patient Items – GL used is 72535
Patient Food – GL used is 72010