Cellular Phone Reimbursement

Cellular Phone Reimbursement is classified as the reimbursement of personally incurred cellular phone/data plan charges partially used in relation to business and deemed a necessary business expense by the department. If cellular phone/data plan charges are exclusively used for business, the expense should be in the name of and billed directly to OU. The Travel Card cannot be used to pay for cellular phone/data plan charges. Please use this guide to appropriately expense Cellular Phone Reimbursement.

Accessing Concur

1. Go to Travel.ou.edu and login with your 4x4 or username.
2. Click Expense from the main menu and either select + Create New Report or access an open report by clicking on the report name.
3. For more information on how to complete the report header, see the Report Header job aid.

Cash/Out of Pocket Charges

4. To expense a Cash/Out of Pocket charge, click on Add Expense.

5. Select the + Create New Expense tab in the pop-up window.
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1. Either type in Cellular Phone Reimbursement in the Expense Type search bar or scroll though the list of expense types and select Cellular Phone Reimbursement.

2. Enter in the Transaction Date by using the calendar option or type in the date using the format of MM/DD/YYYY. The date used should be the payment date noted on the receipt or the last day of the billing cycle.

3. Ensure that the Traveler Type, Trip Type, Report/Trip Purpose and Event Name/Nature of Business fields all fill down appropriately from the report header as these are required entries.

4. Change the Payment Type to Cash/Out of Pocket.

5. Enter the amount being requested for reimbursement in the Amount field. Note that the amount will default to US Dollars (USD). Do not enter in commas or dollar signs in this field.

Receipts

6. All charges for Cellular Phone Reimbursement will require a receipt. To satisfy the receipt requirement, add the receipt by selecting Attach Receipt Image to the right of the expense. Note that if the receipt field is not present, click on the Show Receipt hyperlink at the top right of the screen.

7. A pop-up box will appear and you can click Upload Receipt Image to locate the receipt saved on a local device or, if the receipt image was uploaded previously, the receipt will be available to select.

8. Click on the correct receipt and click Attach.
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9. The receipt image will appear to the right of the screen. Click **Save Expense** at the top right or bottom left of the screen.