Exams

Exams are classified as reimbursable expenses for services and supplies related to examinations. The Travel Card cannot be used to pay for Exams. Exams can be reimbursed after the employee has paid the expense but departments may place additional restrictions on employees and not allow for the reimbursement of Exams until a passing grade is provided. Please use this guide to appropriately expense reimbursements for Exams.

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.
Exams

6. Either type in Exams in the Expense Type search bar or scroll though the list of expense types and select Exams.

7. 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 transaction date noted on the receipt.

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

9. Enter the amount 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

10. All charges for Exams will require a receipt. To satisfy the receipt requirement, add the receipt by selecting Upload Receipt Image. Note that if the receipt field is not present, click on the Show Receipt hyperlink at the top right of the screen.

11. 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 in the available receipts.

12. Click on the correct receipt and click Attach.

13. The receipt image will appear to the right of the screen. Click Save Expense at the top right or bottom left of the screen.