## Concur – Payments on Behalf of Students

**Process:** Payments on behalf of students may be processed on expense reports through Concur.

### Procedures

<table>
<thead>
<tr>
<th>Business Procedures Manual</th>
<th>Refer to BPM E-7-14 for official university policies and procedures related to payments on behalf of students. A Payments on Behalf of Students (PBS) Form is required as documentation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK-Travel Policy</td>
<td>Use the UK-Travel Policy for student travel paid by an employee (whether by procard or out-of-pocket) while the employee is in travel status. These expenses are on the employee’s travel expense report.</td>
</tr>
<tr>
<td></td>
<td>• On the Manage Expenses Screen of the Employee’s travel expense report, click on Add Expense.</td>
</tr>
<tr>
<td></td>
<td><img src="image_url" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td>• Choose the student-related expense and click on Add To Report.</td>
</tr>
</tbody>
</table>
• The expense will appear on the Manage Expenses Screen. Click on the Expense Type.

• On the Expense Type form:
  o Complete the required fields denoted with a red asterisk (*).
    - Expense Type – be sure the Expense Type is accurate
    - Trip Type – choose the correct type from the drop down list
    - Trip Purpose – choose the correct purpose from the drop down list
    - Traveler Type = Must be “Student”
  o Add any additional information and comments as necessary
• Add the receipt to the Expense Type.
  o Click on the Plus (+) to attach a receipt image.

  o If the receipt for the expense is already in the receipt library, click attach.
• If the receipt has been scanned but has not been uploaded, click on the Plus (+) to upload an image.

• Choose the appropriate receipt and click on Open.

• The uploaded receipt will be added to the report.

• Add the completed PBS Form to the Expense Type as documentation.
o At the bottom of the receipt image, click on Append.

o Click on the Plus (+) to upload additional documentation.

o Click on the completed PBS Form for the student expense and click Open.
The PBS Form is now part of the documentation for the Expense Type.

When all information and documentation has been added, click on Save Expense.
UK-Expenditure Policy

Use the UK-Expenditure Policy for student expenses paid by an employee on their procurement card when the employee is not in travel status. The student expenses may be travel or non-travel related expenses.

- On the Manage Expenses Screen of the Employee’s procard expense report, click on Add Expense.

- Click on the available procard expense that is a payment on behalf of students and Add To Report.

- Click on the Expense Type.
On the Details Tab, choose the Expense Type.

- Answer the question “Is this expense travel related?” and complete the fields based on the answer:
  - Yes – this is student travel. Complete the required fields:
    - Trip Type
    - Trip Purposes
    - Traveler Type = Student
    - Additional Information or Comment fields - other identifying information for expense
No – this is not student travel. Complete the fields below:

- NonTravel Business Purpose = Payments on Behalf of Student
- Additional Information or Comment fields – other identifying information for expense

Add the receipt to the Expense Type.
- Click on the Plus (+) to attach a receipt image.
- If the receipt for the expense is already in the receipt library, click attach.

Attach Receipt

- If the receipt has been scanned but has not been uploaded, click on the Plus (+) to upload an image.

Attach Receipt

- Choose the appropriate receipt and click Open.
- The uploaded receipt will be added to the report.
- Add the completed PBS Form to the Expense Type as documentation.
  - At the bottom of the receipt image, click on Append.
  - Click on the Plus (+) to upload additional documentation.
Quick Reference Card – Concur

- Click on the completed PBS Form for the student expense and click Open.

- The PBS Form is now part of the documentation for the Expense Type.

- When all information and documentation has been added, click on Save Expense.
<table>
<thead>
<tr>
<th>Special Notes</th>
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<tbody>
<tr>
<td>• The users and approvers must ensure that the PBS Form is included with all applicable expense reports that include payments on behalf of students.</td>
</tr>
<tr>
<td>• Audit Warning Reminder – When one of the conditions below is met, an action warning will appear which reminds the individuals at each workflow step that the PBS Form is required for the expense report:</td>
</tr>
<tr>
<td>o Traveler Type = Student</td>
</tr>
<tr>
<td>o Non-travel Business Purpose = Payment on Behalf of Students</td>
</tr>
<tr>
<td><img src="alert.png" alt="Action Reminder" /> <strong>ACTION:</strong> Per BPM E-7-14, please ensure that the required Payments on Behalf of Students (PBS) Form is attached along with your supporting documentation. View</td>
</tr>
<tr>
<td>• A separate PBS Form must be attached for each transaction on the expense report that is a Payment on Behalf of Students. A single PBS form for the entire report is considered supplementary information and is not adequate documentation for the expense report.</td>
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</tbody>
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<tr>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Questions Contact Customer Service:</td>
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<tr>
<td>o Email – <a href="mailto:concurexpense@uky.edu">concurexpense@uky.edu</a></td>
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</tbody>
</table>