Quick Guide for Student Reimbursement

1. Before you log your first student reimbursement claim, please log into Student Services Online -> Personal Bank Account and enter your bank account.

*Please note, the system will automatically grant you access within two business days, subject to that your bank account is entered by 6 p.m.*

2. Log into Concur via one of the channels below:

   - UoA home page->students->My tools
   - Copy this link [http://www.concursolutions.auckland.ac.nz/](http://www.concursolutions.auckland.ac.nz/) and paste to your browsers
3. **Click ‘Start a Report’**

4. **Complete mandatory fields & click create Report**
   - Report name
   - Department (to enter cost centre code here)
   - Project (if charging to PReSS account, then enter your Upi; If no project applicable, click & select ‘No project’)
   - Project Activity (click & select ‘No project Activity’)
   - Source Type (click & select ‘No Source Type’)

---

**Search ‘Concur’ in the search bar of University Website Home Page**

**Click dropdown menu from ‘Quick Link’ (if you are also an employee)**
5. Click ‘Add Expense’

6. Select Expense Type from the dropdown menu
7. Complete mandatory fields & attach your receipts, supervisor’s approval and other supporting documents (You need to combine them into ONE pdf.)

Note: System will calculate GST automatically if your transaction is GST applicable.
Special note for charging to a PReSS Account

- You must select PReSS related expense type
- Click PReSS Department field to select the cost centre code based on your Faculty
- Department needs to be the same as ‘PReSS department’
- PReSS G/L cdoe: click dropdown to select the right option matching the Expense type
Red flags – if you come across a red flag, this is hard constraint. This means, you can’t submit your report unless the issues in the report are resolved. The red flag message will provide the information of what the issue is and how to resolve it.

Yellow flag – this is just a warning message. You can still submit your report but make sure you read and understand what the message is before submission.

8. After completing the expense details, then click ‘Save Expense’

9. Once all expenses lines are created, click ‘Submit Report’.
10. Read ‘User Agreement’ and Click ‘Accept & Continue’

User Electronic Agreement for Student Reimbursement

By clicking on the ‘Accept & Continue’ button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official study related and there are no expenses claimed as reimbursable which relate to personal or unallowed expenses.

2. All required receipt images, supervisor’s approval and a copy of your PReSS account balance (if applicable) have been attached to this report.

3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.

4. In the event of over payment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Cancel  Accept & Continue
11. Review the claim summary again and click ‘Submit Report’
12. Back to Homepage of Concur, you can tell the report status at the bottom of each ‘box’.

13. To find out who is the approver:
   Double-click the report you want to check -> Click Report Details -> Click Report Timeline