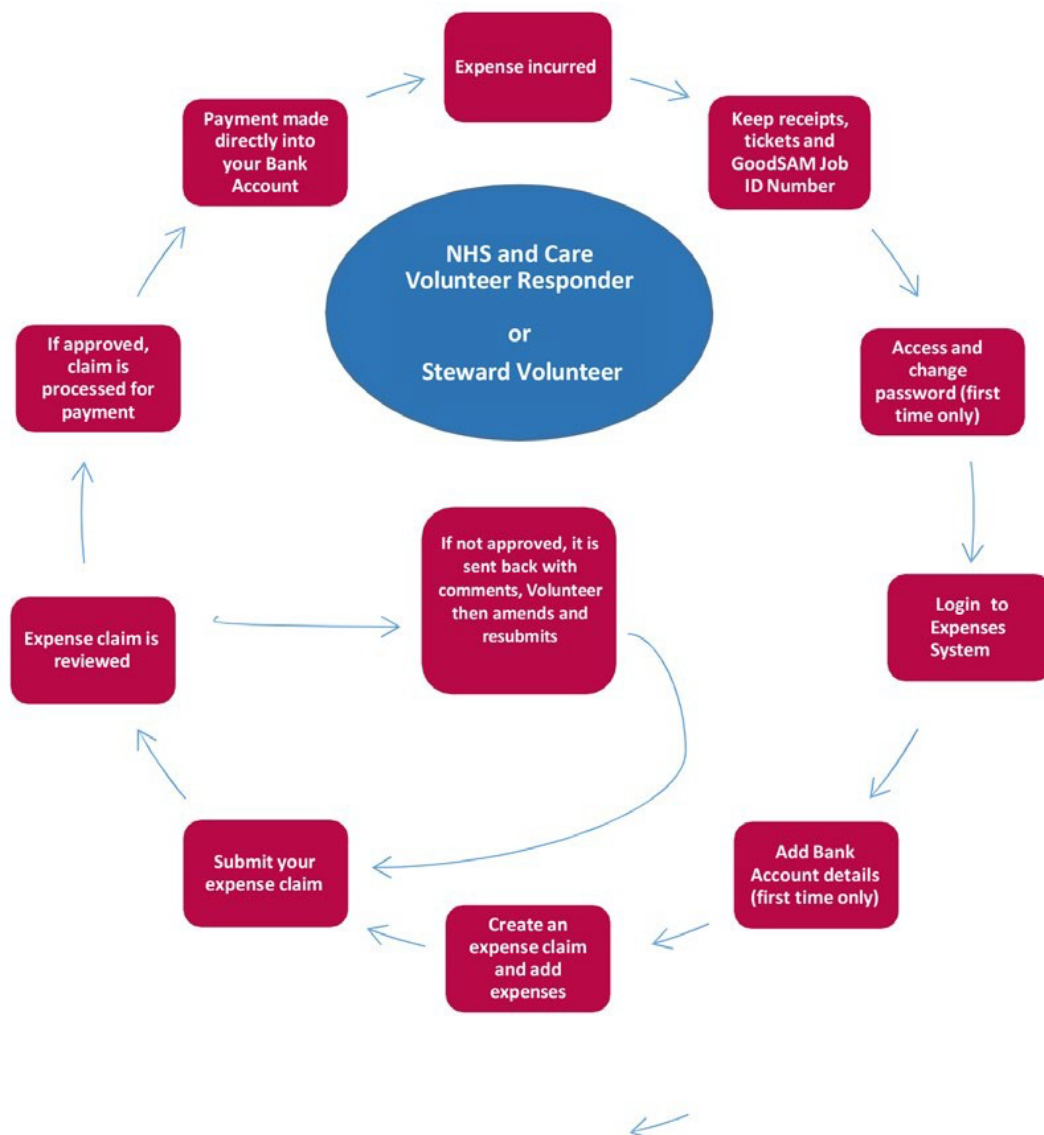


# Expenses System – Quick Start Guide

**Congratulations on completing your first NHS and Care Volunteer Responder or Steward Volunteer task (or maybe even tasks).** If you have incurred reasonable expenses (please see Expense Policy doc for more details), you can make a claim for reimbursement using the Volunteer Responders Expenses System. In this guide you will find all the information you need to be able to do this.

## How to claim your expenses at a glance?



## Terms used

Before we start, let's take a look at some of the terms you will see in the Expenses System and what they mean:

- **Expense Claim** – This is a virtual folder which you add your expenses to. It will require a unique name and once you have submitted an expense claim (containing your expenses) for payment, you will need to create a new expense claim for your next set of expenses. For example, you could create an expense claim named **Week Ending 10th May 2024**, then add all your expenses for that week to this expense claim, submit it for payment and then the following week create a new expense claim named **Week Ending 17th May 2024** and repeat.
- **Expenses** – These are the details of each individual expense which you have incurred, including the date, the type, the Job No / Task ID, the amount and receipt or journey taken (if required). Expenses are added to an Expense Claim.
- **Expense Type** – The types of expenses which you can claim for are; Mileage, Public Transport, Congestion Charge, Toll charge Bridge/Road and Parking. More details on exactly what you can claim for on each expense type, can be found in the **Expense Policy** and **Frequently Asked Questions** on the Training page - <https://www.concur.co.uk/rvs>
- **Available Expenses** – These are the receipts which you have scanned using the Concur App or have emailed into the Expense System which have not been added to an expense claim.
- **Open Claims** – These are the expense claims which you have created. You will be able to see expense claims which you have submitted (you can see their status too) and also ones which you haven't submitted yet.
- **Donation/Donate** – By selecting this option you are saying that you do not wish to be reimbursed for your selected expense or expenses; instead you would like your donated expense(s) to be donated for services that support the NHS and Care and are delivered by Royal Voluntary Service. You can choose to donate an expense or expenses by selecting the **Donation** checkbox (on a computer) or the **Donate** slider (on a mobile device) when creating the expense.

Please Note: Before you'll be able to claim expenses incurred during your voluntary role, you will need to make note of some important information whilst you are completing a Job via GoodSAM. You will need to remember to:

- **GoodSAM Job No / Task ID** – Make a note of the GoodSAM Job ID for each job that you accept. You will need to know this when making a claim, to demonstrate where the expenses occurred. You can also find a list of the GoodSAM Job IDs, for Jobs which you have completed and the dates that you completed them, in the **Report** section of the GoodSAM app.
- **Receipts and Tickets** – You will also need to retain receipts and tickets for Public Transport, Congestion Charge, Toll charge Bridge/Road, Subsistence (Steward and Connect volunteers only), Activities (Connect volunteers only) and Parking.
- **Postcodes** – Finally you will need to keep a note of any postcodes for your journeys. These will be needed to claim Mileage.

## Accessing the Expenses System

The Expenses System is supported by SAP Concur and therefore it can be accessed from your computer or your mobile device (Apple or Android).

To access the Expenses System from your computer:

1. Click on the following link: <https://www.concursolutions.com>
2. It's a good idea to add this link as a Favourite/Bookmark on your web browser to make it easy to launch the Expenses System in the future.
3. Alternatively, you can access the Expenses System via the **Login** button on the Training page. Also on the Training page, you will find 'how to' **videos**, **Frequently Asked Questions**, the **Expense Policy** and much more. You can visit the Training page here - <https://www.concur.co.uk/rvs>

To access the Expenses System from your mobile device:

1. You will need to download the SAP Concur app from your mobile device's app store. You can do this by either:
  - On your mobile device, tap the relevant link below (for your type of device) and then choose to install the SAP Concur app:
    - Android - [https://play.google.com/store/apps/details?id=com.concur.breeze&hl=en\\_GB](https://play.google.com/store/apps/details?id=com.concur.breeze&hl=en_GB)
    - Apple - <https://apps.apple.com/us/app/sap-concur/id335023774>
  - Or, if you can receive emails on your mobile device, you can use the Concur Mobile Registration functionality to send you an email containing a link. Then when you can tap on the link on your mobile device, and it will go straight to the correct app store and app.

However, to send this email, you will need to sign in to Concur on your computer (not mobile device), click on Profile (top right), select Profile Settings, select Personal Information, select Concur Mobile Registration and then click the Get Started button.
2. There are 'how to' videos at the bottom of the Training page which will show you how to do install the app on each type of mobile device (Apple and Android). You can visit the Training page here - <https://www.concur.co.uk/rvs>

## Logging in for the first time

Once you have the SAP Concur web page open (on a computer) or the app installed and open (on a mobile device), you are ready to log on. However, it is recommended that the first time you log on, you do so from a computer or using the browser on your mobile device and not the app. This is because you cannot add your Bank Account details via the Concur App. If you do not have a computer, please see the Frequently Asked Questions on the Training page for more information. You will find Training page here - [https:// www.concur.co.uk/rvs](https://www.concur.co.uk/rvs)

Royal Voluntary Service have sent you an email containing your Username, which you will need. The email will have been sent to the email address you used to register with GoodSAM. Please check your Junk/Spam folder if you haven't received this. (Please note: New users are loaded every Tuesday night (a new user would have to have performed a task between last Tuesday and Monday prior to the load and emailed on Wednesday).

### To log in for the first time:

1. Type your Username in the **Username** box and then click **Next**.
2. When it asks you to enter your password, click on **Forgot Password**.
3. Click **Send**.
4. An email containing a link to set your password will now be sent to the email address you use to login to GoodSAM. Please check your Spam/Junk folder if it doesn't arrive after 10 minutes.
5. Open the email, which will be from [noreply@concur.com](mailto:noreply@concur.com) and click on the **Reset Your Password** button.
6. On the **Reset Password** screen, after reading the password requirements, type in your chosen password in the **New password**.
7. Then finally, type your new password again in the **Confirm New Password** box and click **Submit**.
8. Click **Return to Sign in**.
9. Login using your Username and New Password.
10. You will then be asked to set up or use Multifactor Authentication (MFA). See our MFA guide for further information on how to set this up <https://www.concur.co.uk/rvs>.

11. Once you have logged in you will see the Concur home screen:

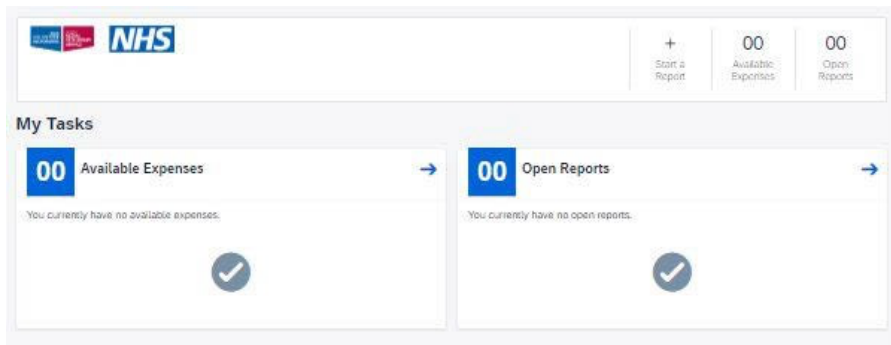



Figure 1 - Concur home screen (from a computer)

## Providing your Bank Account details

After you have changed your password but before you can submit your expenses, you must provide your Bank Account details. We need you to supply these details so that we can reimburse you. Please see the Frequently Asked Questions on our Training page (<https://www.concur.co.uk/rvs>) for more information on this.

Please ensure you double check that these are correct before saving them, as providing incorrect Bank Account details may affect you being reimbursed. Royal Voluntary Service will not be responsible for incorrect bank details and cannot reimburse for payments made to incorrectly entered bank details.

To provide your Bank Account details:

1. Click on the  button in the top right corner of the home screen of Concur.
2. Select **Profile Settings**.
3. Select **Bank Information**.
4. Type in your Bank Account details in the relevant boxes provided.
5. Click **Save and Authorise**.

### Bank Information

|  |  |                                       |
|--|--|---------------------------------------|
| Bank Country/Region<br><input type="text" value="UNITED KINGDOM"/> | Bank Currency<br><input type="text" value="UK, Pound Sterling"/> |                                       |
| Sort Code<br><input type="text"/>                                  | Account Number<br><input type="text"/>                           |                                       |
| Bank Name<br><input type="text"/>                                  | Branch Location<br><input type="text"/>                          | Status<br><input type="text"/>        |
| Active<br><input type="text" value="Yes"/>                         |  |                                       |
| Full Legal Name of Account Owner<br><input type="text"/>           | Building Number and Road<br><input type="text"/>                 | Building Name<br><input type="text"/> |
| Town<br><input type="text"/>                                       | Locality<br><input type="text"/>                                 | Postal Code<br><input type="text"/>   |

**Save And Authorize**

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.

Sort Code is your bank's 6 digit routing number and UK account numbers must be 8-digits.

The address associated with the bank account must include a value for either Building Number and Road, or a Building Name.

### Account History

| Bank Account Num... | Active | Activity | Description | Last Changed | Changed By |
|---------------------|--------|----------|-------------|--------------|------------|
|                     |        |          |             |              |            |

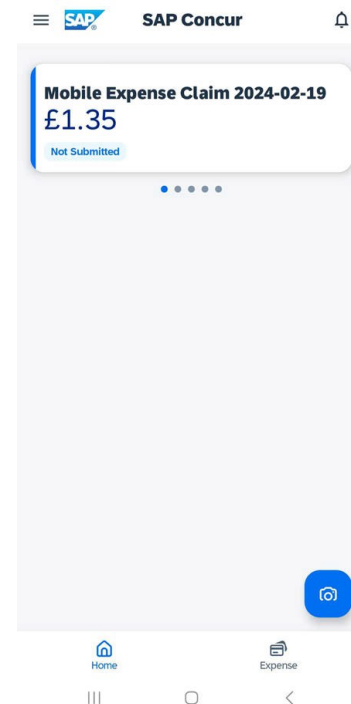
Figure 2 - Bank Information Screen

## Creating an Expense Claim and adding Expenses

### From a mobile device

#### Mileage

1. From the Concur app home screen, tap the **Expense** icon.
2. On the next page select the '+' on the bottom of the screen.
3. Choose '**Create New Claim**' and select which role the expense relates to either NHSC Volunteer Responder or Steward Volunteer. *(Remember you cannot have NHS and Care Volunteer Responder and Steward Volunteer expenses on the same expense claim –you will need to do separate expense claims for each role).*
4. Select '**Create**'. This will take you to a new page, click the '+' button again, add '**New Expense**', select **personal mileage** and then add route details. To do this tap **Add Route**. As the Concur app uses Google Maps, you can search for a specific address.
5. Type in the postcode of your starting point in the **Start Location** box.
6. Type in the postcode of your next/final stop on your journey in the **Add Destination** box.
7. Add any further destinations in the subsequent **Add Destination** boxes which appear. If the final leg of your journey was to return to your starting point, type in the postcode of this in the **Add Destination** box.
8. You may be presented with several possible routes which you could have taken. If you are, select the one which best represents the route which you took.
9. Once you are happy with your route, tap **Use Route** (or **Save**).
10. You will need to select the GoodSAM Job ID\*, which is relevant to this expense, from the list which appears when you tap on **Job No./Task ID**. \*You can find a list of the GoodSAM Job IDs, for Jobs which you have completed and the dates that you completed them, in the **Report** section of the GoodSAM app.
11. Select the correct **Transaction Date** (date of travel)
12. You also have the option to add **Comments** or to **Donate** your expense, if you wish.
13. Tap **Save** or **Submit**



If you need to add another expense to this claim, then follow the relevant section below. If you do not need to add any other expenses to this claim, proceed to the [Submitting your Expense Claim](#) section.



## Public Transport, Congestion Charge, Toll Bridge/Road, Subsistence, Activities or Parking

1. From the Concur app home screen, tap the **camera** icon.
2. This will open up your camera on your mobile device. Ensure that you can see all of your receipt and then tap the white circle to take the photo.
3. The Concur app will read the receipt and prompt you with the total amount on the receipt. If this is correct, select the amount and then continue on to the next step in this process. *If the total is incorrect, select the **Incorrect** button, type in the correct amount and tap **Use** and then **Done**. The amount could be incorrect because the receipt is of poor quality or it may just be that you have multiple items on a receipt but only wish to claim for one or two of those items.*
4. The Concur app will now analyse your receipt and send a notification to your phone when it has completed this.
5. You should now see your newly added receipt in the **Expenses** screen, you will need to tap on it to edit the details.
6. If your **Expense Type** shows as UNDEF, tap on it and change it to reflect the real expense type.
7. Check that the date (on which the expense was incurred) is correct and amend if needed.
8. Tap **Save**, click on the expense again and tap **Move to Claim**.
9. Select an existing expense claim to add this expense to or tap on the + icon to create a new expense claim and select the role for which you incurred the expense.
10. Tap on the expense which you have just moved to the claim and double check the details. Amend the details if required.
11. You also have the option\* to add **Comments** or to **Donate** your expense, if you wish. \*The Comments field on the Public Transport expense type is mandatory. Please provide details of the beginning, middle (if applicable) and end of your journey here.
12. Tap **Save or Submit**
13. If you need to add another expense to this claim, then follow the relevant section above or below before submitting. If you do not need to add any other expenses to this claim, proceed to the [Submitting your Expense Claim](#) section.





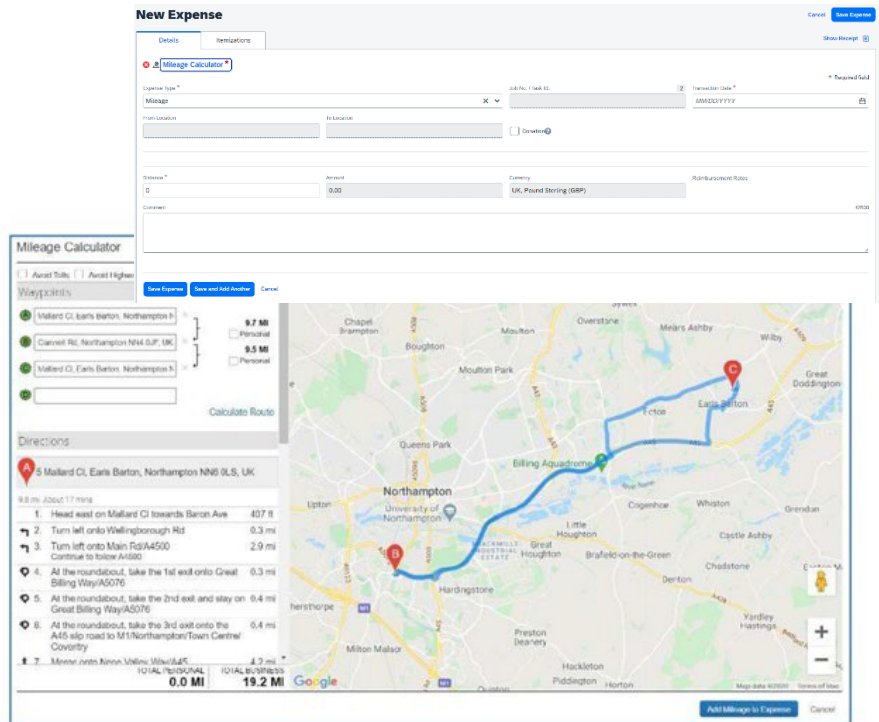
## Phone Calls

1. From the Concur app home screen, tap the **Expense** icon. (*Then follow steps 1-4 from page 6*)
2. Select **Phone Calls** as the **Expense Type** and enter the amount that you wish to claim for.
3. Enter all the relevant details. You also have the option to add Comments or to Donate your expense, if you wish.
4. Tap **Save**.
5. On the **Home** screen, find your **Phone Calls** expense and tap on it and you will be presented with the details again.
6. Check all the information is correct and tap **Save** or **Submit**.

## From a computer

### Mileage

- From the Concur home screen, click on **+ Start a Claim**, provide a **Claim Name** and select the role (NHS and Care Volunteer Responder or Steward Volunteer) for which you incurred this/these expense(s). Remember you cannot have NHS and Care Volunteer Responder and Steward Volunteer expenses on the same expense claim – you will need to do separate expense claims for each role. Alternatively, if you have created an expense claim previously, click on **Open Claims** and then select the relevant expense claim.
- Select **Personal Car Mileage** as the **Expense Type**.
- As Concur uses Google Maps, you can search for a location instead of a specific address. On the Mileage Calculator screen, type in the postcode or name of your starting point in box **A**.
- Type in the postcode or name of your next stop on your journey in box **B**.
- Click **Calculate Route**.
- If you need to add any further destinations, do this by typing them in the subsequent boxes which appear each time you click **Calculate Route**.
- If the final leg of your journey was to return to your starting point, click **Make Round Trip**.
- Once you are happy with your route, click on **Add Mileage to Expense**.
- Select the GoodSAM Job ID\*, which is relevant to this expense, from the list which appears when you click on **Job No./Task ID**. \*You can find a list of the GoodSAM Job IDs, for Jobs which you have completed and the dates that you completed them, in the **Report** section of the GoodSAM app.
- Select the relevant **Transaction Date** (the date of travel).
- You also have the option to add **Comments** or to donate your expense (by selecting the **Donation** checkbox), if you wish.
- Click **Save**.
- If you need to add another expense to this claim, then follow the relevant section below. If you do not need to add any other expenses to this claim, proceed to the [Submitting your Expense Claim](#) section.



## Public Transport, Congestion Charge, Toll Bridge/Road, Subsistence, Activities or Parking

1. From the Concur home screen, click on **+ Start a Claim**, provide a **Claim Name** and select the role (NHS and Care Volunteer Responder or Steward Volunteer) for which you incurred this/these expense(s). Remember you cannot have NHS and Care Volunteer Responder and Steward Volunteer expenses on the same expense claim – you will need to do separate expense claims for each role. Alternatively, if you have created an expense claim previously, click on **Open Claims** and then select the relevant expense claim.
2. If you have not used the Concur mobile app to take a photo of your receipt for this expense, please continue to step 3 below.

If you have taken a photo of the receipt for this expense using the Concur mobile app but haven't added it to an expense claim yet:

- a. You will see it listed in the **Available Expenses** on the right-hand side. Select the expense by clicking on it once.
  - b. Select **Move**.
  - c. The expense will now appear on the right hand side. Click on the expense and you will see its details appear on the right.
3. Select, **Public Transport, Congestion Charge, Toll Bridge/Road**, or **Parking** as the **Expense Type**.
  4. Select the GoodSAM Job ID\*, which is relevant to this expense, from the list which appears when you click on **Job No./Task ID**. \*You can find a list of the GoodSAM Job IDs, for Jobs which you have completed and the dates that you completed them, in the **Report** section of the GoodSAM app.
  5. Select the relevant **Transaction Date** (the date on which the expense was incurred).
  6. Type in the **Amount** that you wish to claim for this expense.
  7. You also have the option\* to add **Comments** or to donate your expense (by selecting the **Donation** checkbox), if you wish. \*The Comments field on the Public Transport expense type is mandatory. Please provide details of the beginning, middle (if applicable) and end of your journey here.
  8. Click **Save**.
  9. Click on the expense on the left hand side to show the details on the right again.
  10. If you did not previously scan and attach your receipt (using the Concur mobile app) you will notice that the expense now has a red alert prompting you to attach your receipt. To attach your receipt via a computer you have two options:
    - Scan your receipt or take a photo with your computer's camera – both will create a file on your computer which you can then attach as a receipt. To do this, click **Attach Receipt**, then browse to and select your receipt and then click **Open**, followed by **Attach**.
    - Or; if you have received the receipt via email, you can email it into the system. However, before you can do this, you will need to verify your email address for this service. Please see the Frequently Asked Questions on our Training page for more information on this. You will find Training page here - <https://www.concur.co.uk/rvs>. Receipts which have been emailed in will appear in the Available Expenses section, when you click Attach Receipts. Once you have selected your receipt, click Attach.

11. If you need to add another expense to this claim, then follow the relevant section above or below. If you do not need to add any other expenses to this claim, proceed to the [Submitting your Expense Claim](#) section.

## Phone Calls

1. From the Concur home screen, click on **+ Start a Claim**, provide a **Claim Name** and select the role (NHS and Care Volunteer Responder or Steward Volunteer) for which you incurred this/these expense(s). Remember you cannot have NHS and Care Volunteer Responder and Steward Volunteer expenses on the same expense claim – you will need to do separate expense claims for each role. Alternatively, if you have created an expense claim previously, click on **Open Claims** and then select the relevant expense claim.
2. Select **Phone Calls** as the **Expense Type**.
3. Select the GoodSAM Job ID\*, which is relevant to this expense, from the list which appears when you click on **Job No./Task ID**. \*You can find a list of the GoodSAM Job IDs, for Jobs which you have completed and the dates that you completed them, in the **Report** section of the GoodSAM app.
4. Select the relevant **Transaction Date** (the date on which the expense was incurred, if it was across multiple dates, select the date of the last phone call which you are claiming for in this expense claim).
5. Type in the **Amount** that you wish to claim for this expense.
6. You also have the option to add **Comments** or to donate your expense (by selecting the Donation checkbox), if you wish.
7. Click **Save**.

If you need to add another expense to this claim, then follow the relevant section above or below. If you do not need to add any other expenses to this claim, proceed to the [Submitting your Expense Claim](#) section.

## Submitting your Expense Claim

If you have not added your Bank Account details to the Expenses System, you will not be able to submit your expense claim. Please return to the section entitled [Providing your Bank Account details](#).

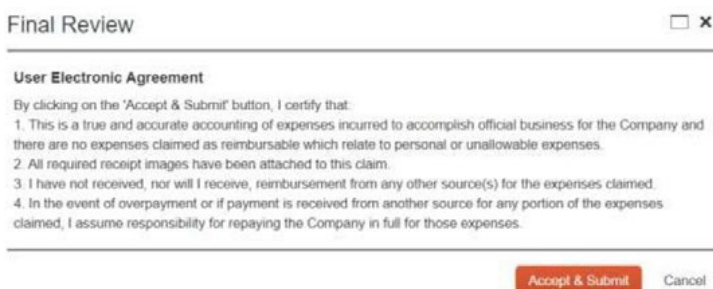
If you have previously created your expense claim, have added your expenses to it and are now ready to submit your claim for approval and payment, then complete the following steps:

### From a mobile device

1. Tap on **Expense Claims** on the Concur app home screen.
2. Tap on the expense claim that you wish to submit and double check that all of the details are correct, amend if required.
3. Tap **Submit**.
4. Read and tap **Submit** to accept the **User Electronic Agreement**.
5. If prompted, tap **OK** to the **Claim Submitted** message (only appears on some Android versions).

### From a computer

1. Click on **Open Claims** on the home screen.
2. Click on the expense claim that you wish to submit.
3. Double check that all of the details are correct, amend if required.
4. Click **Submit Claim**.
5. Read and click **Accept & Submit** to accept the **User Electronic Agreement**.



Final Review  x

**User Electronic Agreement**

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this claim.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment 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.

Figure 6 - User Electronic Agreement (on a computer)

6. Click **Close** to the **Claim Successfully Submitted** message.

## Approval and Payment

### Expense claim review and approval

Once you submit your expense claim it will be reviewed and audited, and if it is approved, it will be processed for payment. If you have exceeded any of the limits set in the **Expense Policy**, it will be sent for an additional review and further authorisation. This may delay the payment of your claim. In the **Frequently Asked Questions** on the Training page, you will find a key to what the different alerts and warnings mean. You will find Training page here -

<https://www.concur.co.uk/rvs>

### Queries over submitted expense claims.

For most claims requiring a receipt, your claim will go through an automatic audit process by Concur when it is submitted (*this does not include subsistence or mileage claims*).

If your claim is returned to you by Concur, the report you will receive will contain comments on why it has been returned and will contain information on what action you need to take. When you have made the amendments and resubmitted, this will then be reviewed again, and if approved, sent for payment.

You will have 3 attempts of resubmitting a claim, and if still not correct after this time, it will be rejected and sent for additional audit by Royal Voluntary Service staff. Mileage and Subsistence claims will continue to be reviewed by Royal Voluntary Service and if there are any comments will be returned for you to review and submit.

Your expense report listed below has changed status.

---

|                        |                       |
|------------------------|-----------------------|
| Changed By             | Concur Auditor1       |
| Report Name            |                       |
| Report Date            |                       |
| Submit Date            |                       |
| Amount Approved        |                       |
| Approval Status Set To | Sent Back to Employee |
| Payment Status Set To  | Not Sent for Payment  |
| Approver's Comments    |                       |

*Your report has been audited, if you have any questions please contact [audit.support@sap.com](mailto:audit.support@sap.com).*


- Your company policy does not authorise reimbursement for Fuel expenses when paid by a corporate card. Please mark this portion as personal and resubmit for
- Your company policy does not authorise reimbursement for Fuel expenses when paid by a corporate card. Please mark this portion as personal and resubmit for
- Your company policy does not authorise reimbursement for Fuel expenses when paid by a corporate card. Please mark this portion as personal and resubmit for

[View Report](#)



You can view and action the returned report in the following ways:

### From a mobile device

1. Tap on Expense Claims on the home screen of the Concur app. Your expense claim will have a red status of **Sent Back to Volunteer** under it.
2. Tap on the expense claim to open it.
3. Tap on the **Details** tab.
4. Tap on the **Comments** line and it will then take you to the **Comments** screen and display any comments made by the approver.
5. If you need to make a comment back to the approver, tap the + in the top right corner, type your comment and then tap **Save** (or ).
6. Make any amendments that are required before submitting your expense claim again (tap **Submit** and then **Submit** again to accept **User Electronic Agreement**).

### From a computer

1. On the Concur home screen, under the **Open Claims** section, your expense claim will have a red status of **Returned** next to it.
2. Click on the expense claim to open it.
3. Click on **Details**.
4. Then select **Comments**. You will now be presented with the **Comment History** screen, displaying any comments made by the approver.
5. Click **Close** when you have read the comments.
6. If you have any comments to make in return, click on the expense which has the alert/warning or query and then then type your comments in the **Comments** box and then click **Save**.
7. Make any amendments that are required before submitting your expense claim again (click **Submit**, then **Accept & Submit** to accept the **User Electronic Agreement** and then click **Close** to the **Claim Successfully Submitted** message).

## Payment made directly into your Bank Account

Once the payment has been processed it will take a few days to reach your Bank Account. As a guideline, if your expense claim is submitted and approved before 5pm on a Friday, then it will be paid into your Bank Account on the following Wednesday. If it is received/approved after 5pm on a Friday, it will not be processed until the following Friday, and then (if approved) paid the following Wednesday after that.

If you have entered your Bank Account details incorrectly, this will affect how and when you are reimbursed. Royal Voluntary Service will not be responsible for incorrect bank details and cannot reimburse for payments made to incorrectly entered bank details. So please do ensure that these details are correct and kept up to date if you change Bank Accounts. You can amend the details in the same way you provided them originally.

## Training and Help

In addition to this document, you will find a lot of additional information, which you may also find helpful, on our Training page:


<https://www.concur.co.uk/rvs>

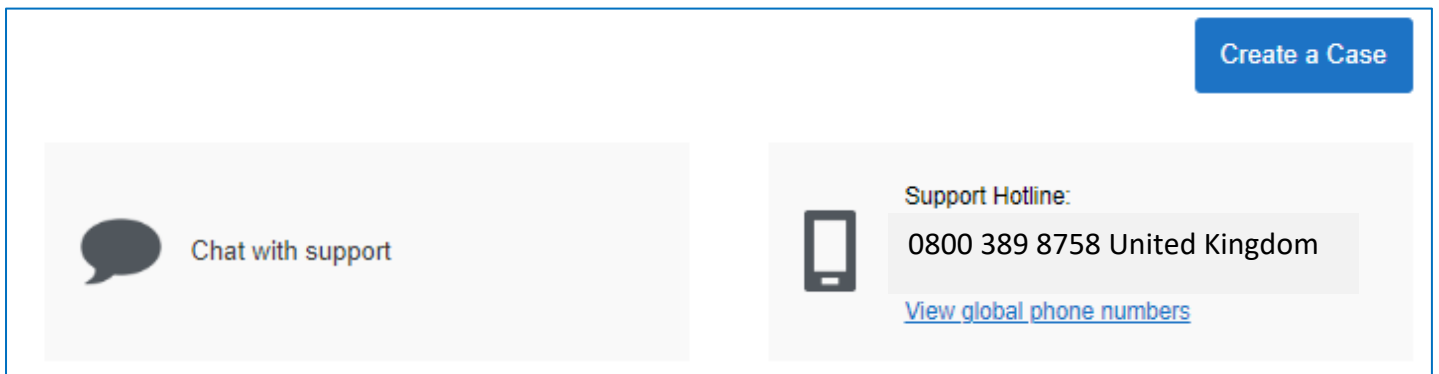
On our Training page you will find a walkthrough video to guide you through the expenses process in its entirety and also individual 'how to' videos which take you through specific parts of the process, for example, how to upload your receipts. You will also find a copy of the Expense Policy and some Frequently Asked Questions, which are worth reading.

However, if you've read this guide, tried the walkthrough video, the 'how to' videos and the Frequently Asked Questions and you are still unable to find an answer to your question, we have support available to you.

For NHSCVR **programme specific queries** e.g. GoodSAM task ID's or specific task information to support your expense claim please contact us by emailing us at:

[NHSVRexpenses@royalvoluntaryservice.org.uk](mailto:NHSVRexpenses@royalvoluntaryservice.org.uk)

Or, for any **technical queries** about navigating the SAP Concur Expenses app or website you can click on the  on the website and select 'Contact Support' where you can either chat with support via message, find the number for their support line, or 'create a case', where a member of the Concur Support Team can help you (as pictured below).



More information about using the support function can be found [here](#)