

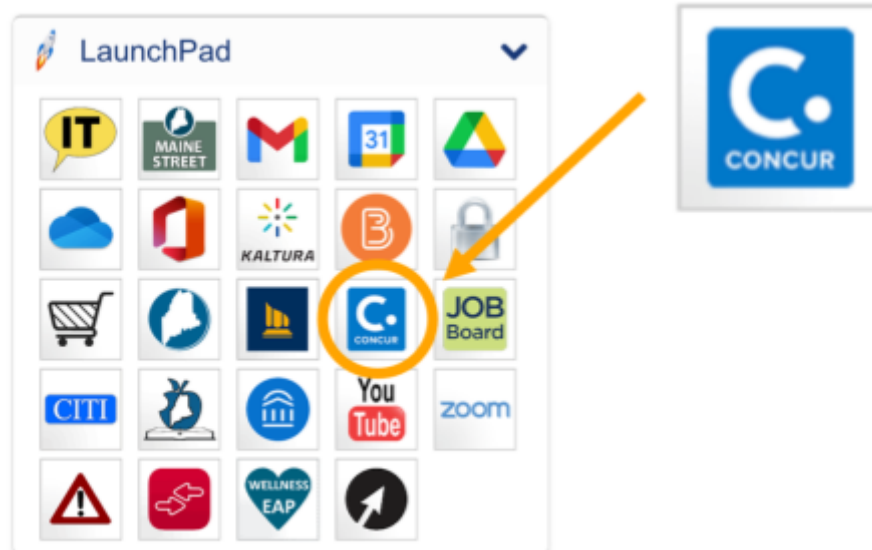
GSPDF Reimbursement Guide

Processes covered in this guide:

- Setting Up Your Concur Account
- Validating Your Profile
- Assigning Your Delegates
- Uploading Your Receipts
- Reimbursement Formats

Setting Up Your Concur Account

During the award process, your Concur account needs to be activated. To verify your account is active, log into your Campus Portal (<https://mycampus.maine.edu/>) and look for the Concur Icon in the LaunchPad (pictured below).



Click on the Concur icon. A new window will open in your browser. If you are unable to login using your maine.edu credentials in the window that opens, your account needs to be activated. If your account is active, a new window will open to your Concur portal.

If your account needs to be activated, please be sure to complete our payment processing form (<https://forms.gle/MnsqrB4UiFAzW1h76>) which will indicate to the Office of Graduate Studies (OGS) that you need to have your account activated for you. After OGS submits the request for activation, you will receive an email notification from University Procurement staff when the

activation request has been processed and your account is ready for use. If you have received account verification and don't have the Concur icon in your LaunchPad, contact **USM's Help Desk at 207-780-4029** for assistance.

The main way to log into Concur is through your Campus Portal Launchpad (pictured above). Select the Concur icon and you will automatically be logged in and directed to the Concur homepage (provided your account has been set up).

Once logged in, your first step is to **validate your profile**. Think of your Concur profile as similar to an online bank account. Your profile **MUST** be validated before creating and submitting requests or reports.

Validating Your Profile

To validate your Concur profile, follow these instructions:

Select your **Profile** menu in the upper right corner of your screen.

Next, select **Profile Settings**.

Next, select **Personal Information**.

#1. Verify that your name is correct, including your Middle Name and Suffix. This should match your government-issued photo ID, i.e. driver's license or passport.

#2. Verify that your Employee/Student ID is correct. In the **University Classification** field select **Student**.

Note: If your Student ID is incorrect, contact usmgradstudies@maine.edu with your full legal name and correct Student ID.

#3. Update your **Home Address**. The default address is what you provided in your GSPDF application.

#4. Enter either a **Work Phone** or **Home Phone**.

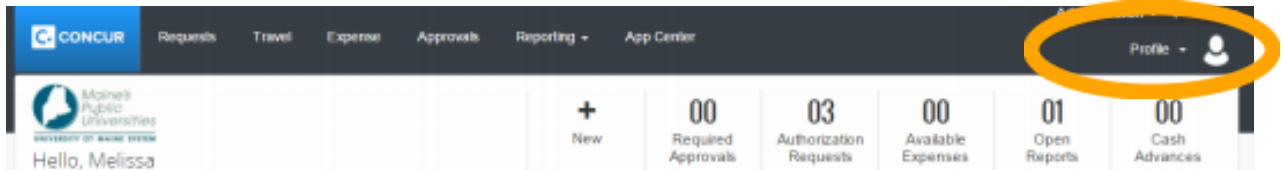
Note: Both are noted as required, but only one must be provided.

Next, you will need to assign your delegates so OGS staff can create requests and submit reports on your behalf.

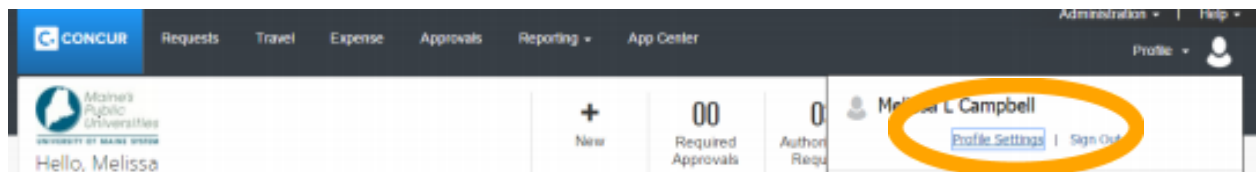
Assigning Your Delegates

A delegate is someone who acts on your behalf. In GSPDF cases, you will assign two delegates, **Sydney Pontau and Michelle Erhard**. To assign your delegates, follow these instructions:

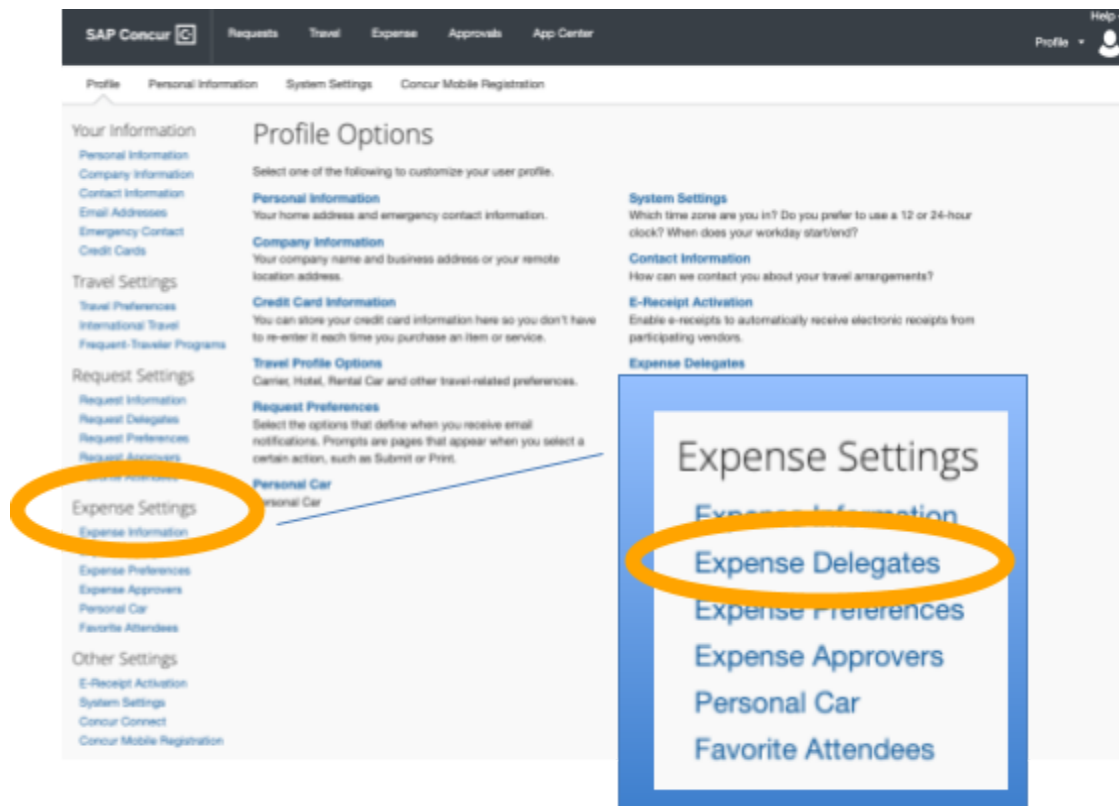
Select your **Profile** menu in the upper right corner of your screen.



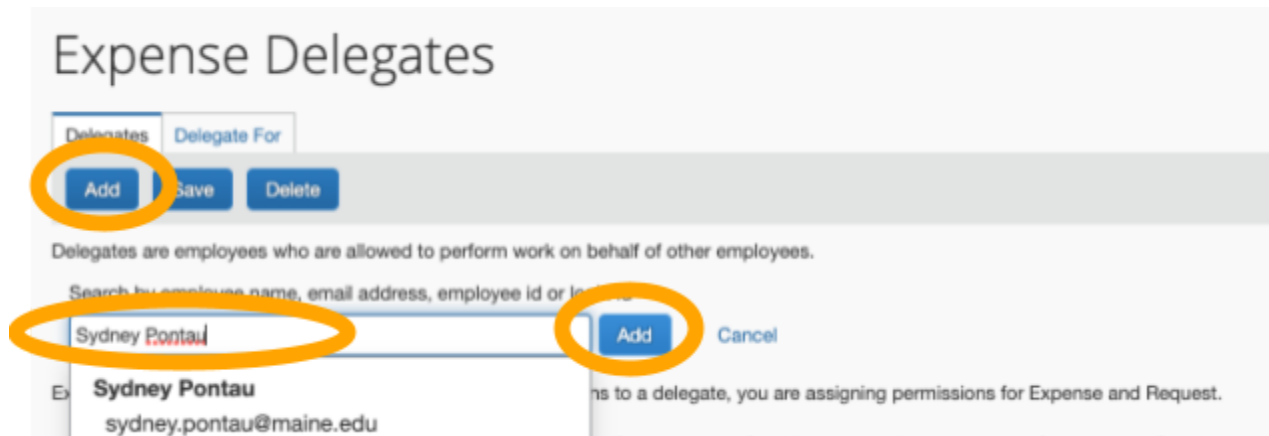
Next, select **Profile Settings**.



Next, select **Expense Delegates**. (This is located under **Expense Settings**.)



Next, select **Add**. In the search field, enter **Sydney Pontau**, then select **Add**.



Expense Delegates

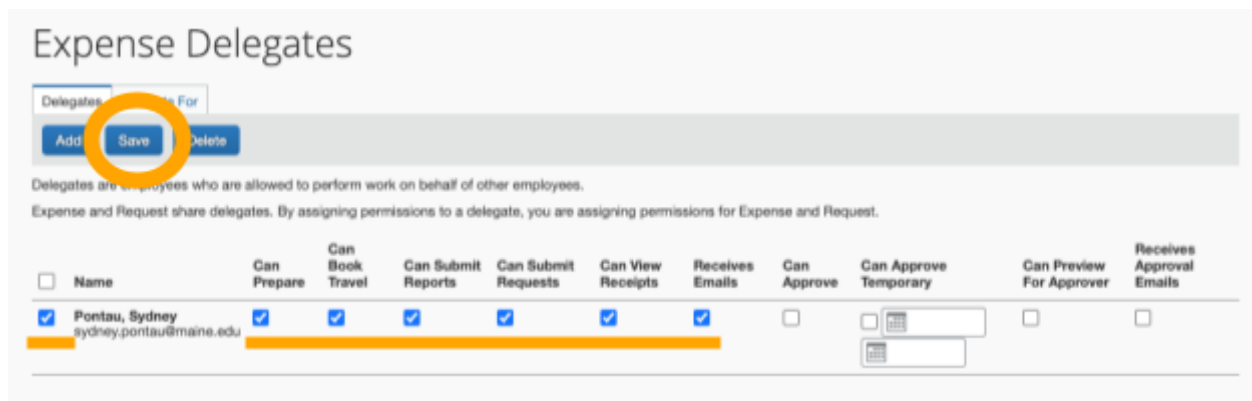
Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or last name

Ex **Sydney Pontau**
sydney.pontau@maine.edu

Select the box to the left of Sydney's name, and then select the boxes to the right. Then select **Save**.



Expense Delegates

Delegates

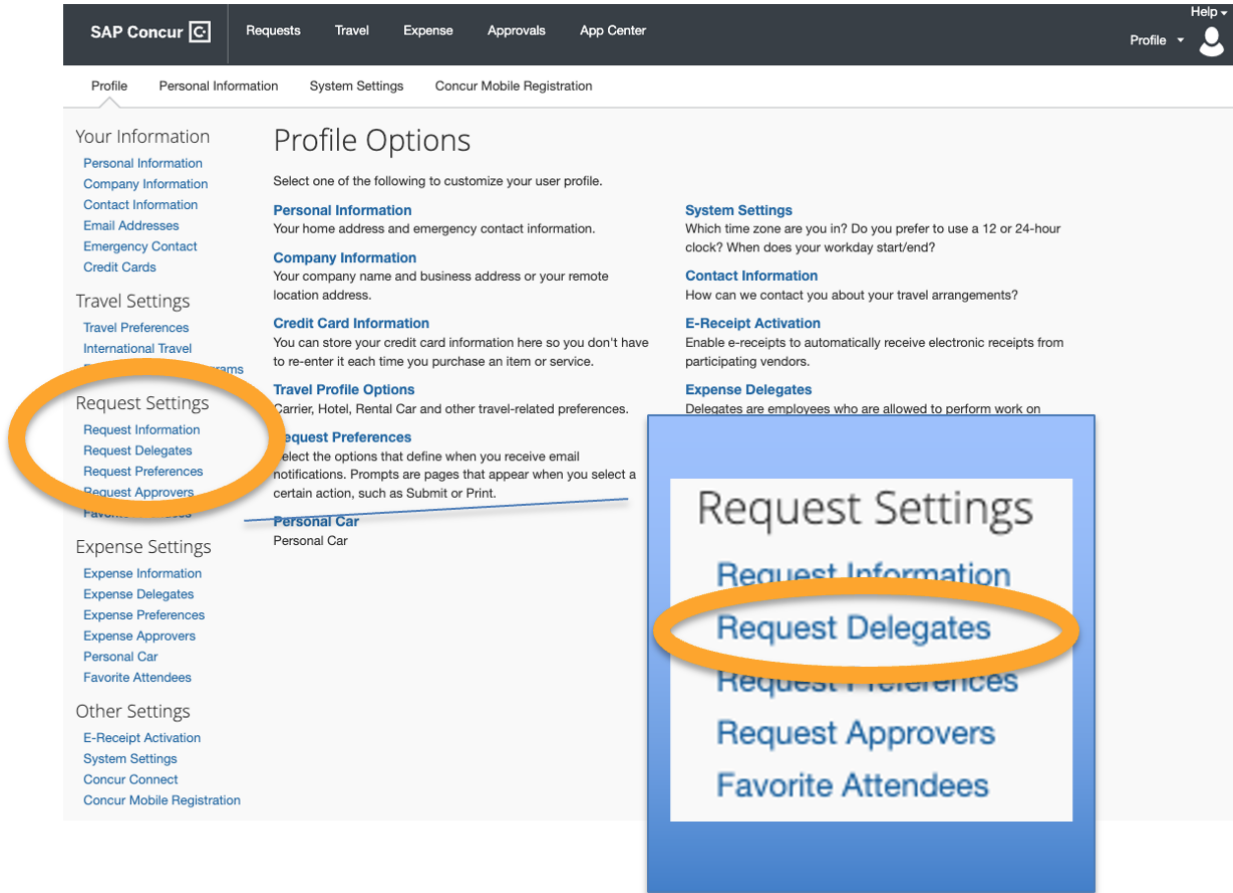
Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

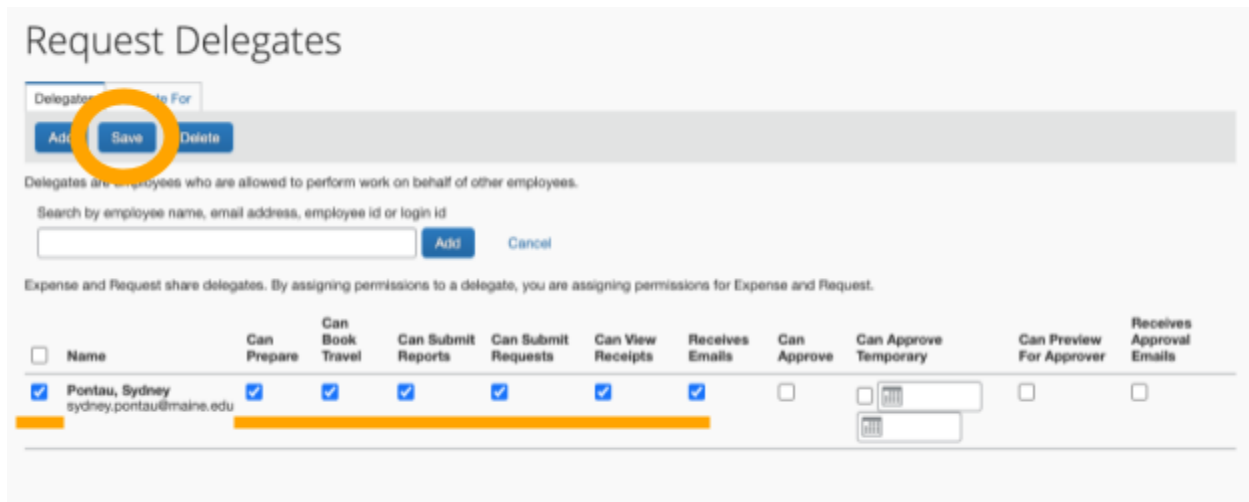
<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Pontau, Sydney sydney.pontau@maine.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Then, add **Michelle Erhard** as an expense delegate.

If your GSPDF award includes travel, please repeat this process to assign Sydney and Michelle as **request delegates** as well (image below). This will allow Sydney or Michelle to create travel requests on your behalf.



The screenshot shows the SAP Concur 'Profile Options' page. The left sidebar contains a 'Request Settings' menu item, which is circled in orange. A blue callout box on the right highlights the 'Request Delegates' option within the 'Request Settings' menu. Other menu items include Request Information, Request Preferences, Request Approvers, and Favorite Attendees.

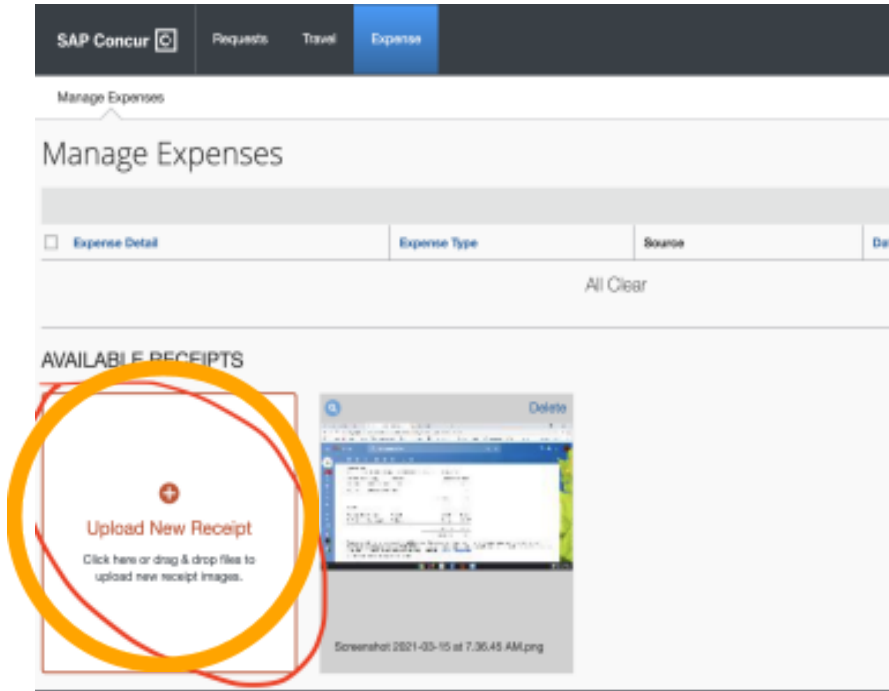


The screenshot shows the 'Request Delegates' configuration page. The 'Save' button is circled in orange. Below is a table of delegates with columns for various permissions.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Pontau, Sydney sydney.pontau@maine.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Uploading Your Receipts

Upload all required receipts under the “expenses” tab where it says “available receipts” Receipts should include your name, date of purchase, an itemized list of all purchases (including taxes and shipping costs), and the total amount spent. **Do not create or submit an expense report**—your delegate will do that for you!



Please notify usmgradstudies@maine.edu after you upload receipts. This will prompt the team to work on your report and use the receipt(s) to submit that report on your behalf.

Reimbursement Formats

Check vs Direct Deposit

The system that processes travel is **separate from the system that processes student payroll. ***Even if you have setup direct deposit for student payroll, mailed checks will be the default payment method for travel.*** Please reference the **USM direct deposit setup page** (<https://usm.maine.edu/directories/enroll-or-modify-direct-deposit/>) if you would like the money to go directly to your bank account.**