Anesthesia Finance Office

UCSF University of California San Francisco

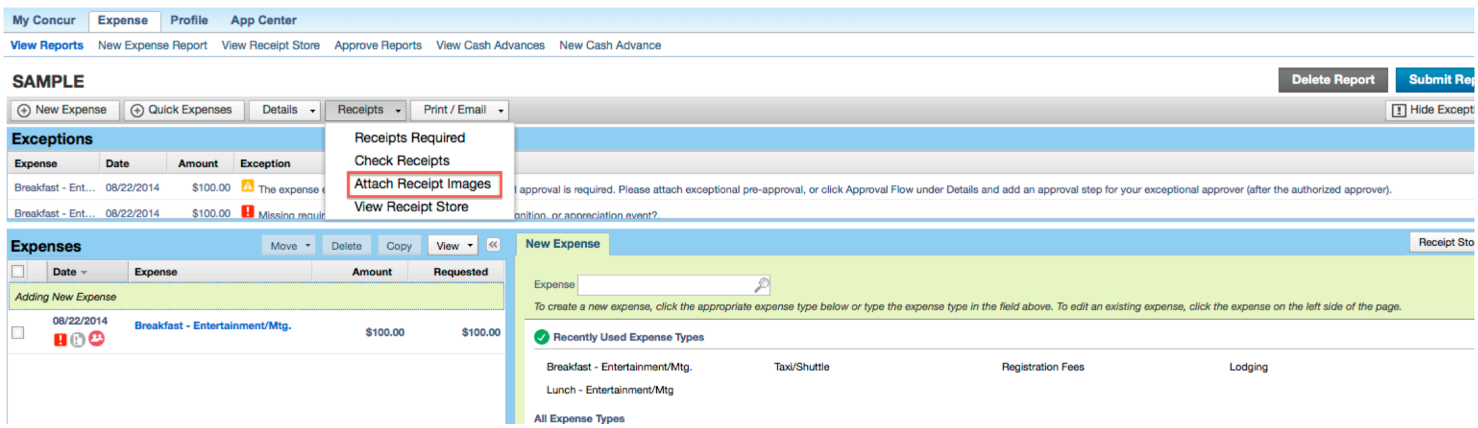
How to Add, Remove, & Edit Receipts

MyExpense CONCUR

Add Receipts

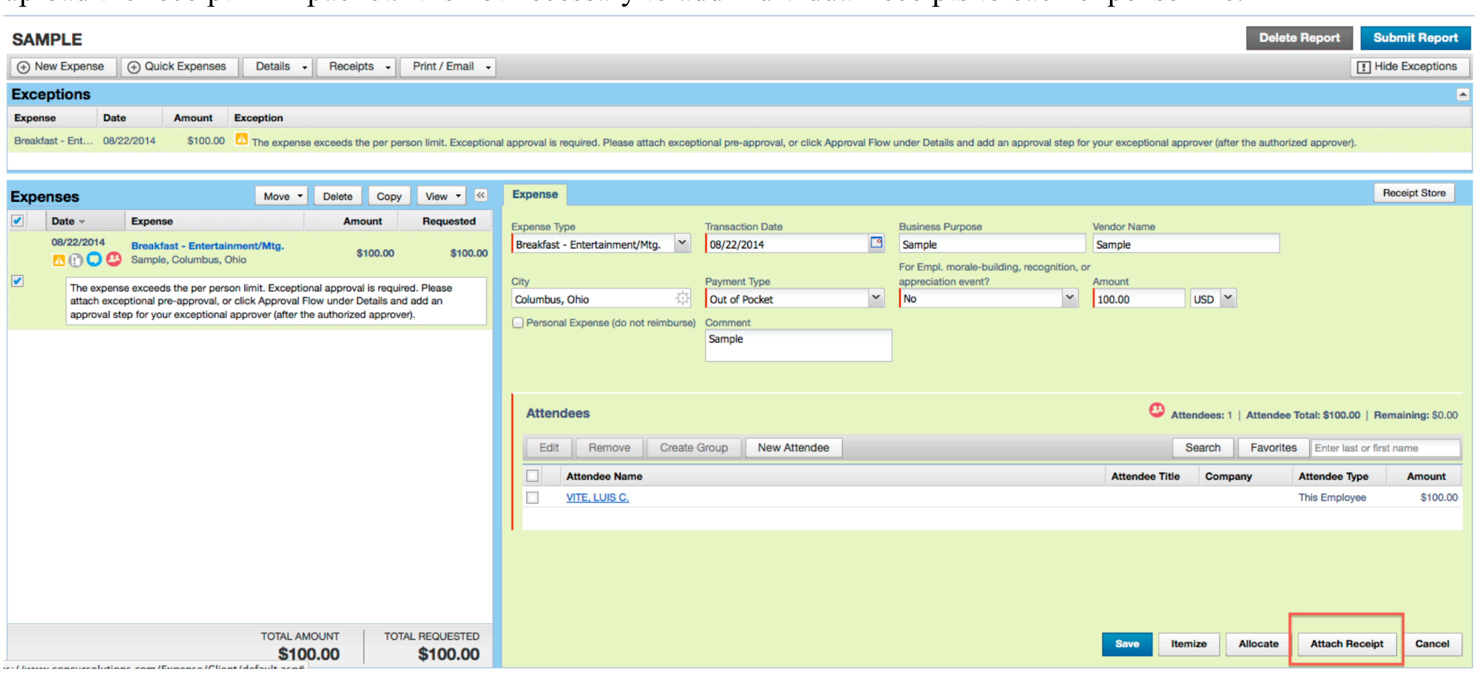
-There are two ways to add a receipt. Choose only one way. DO NOT use both options because duplicate receipts will be created.

Option#1: Upload the whole receipt packet as a PDF. It will make editing the receipt, deleting, and re-attaching easier.



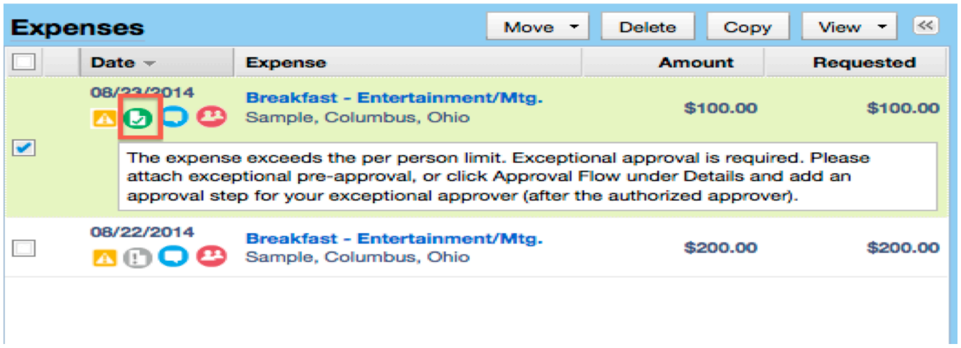
OR

Option#2: Go into only one line item (if there are several lines, it doesn't matter which line you choose) and upload the receipt PDF packet. It is not necessary to add individual receipts to each expense line.

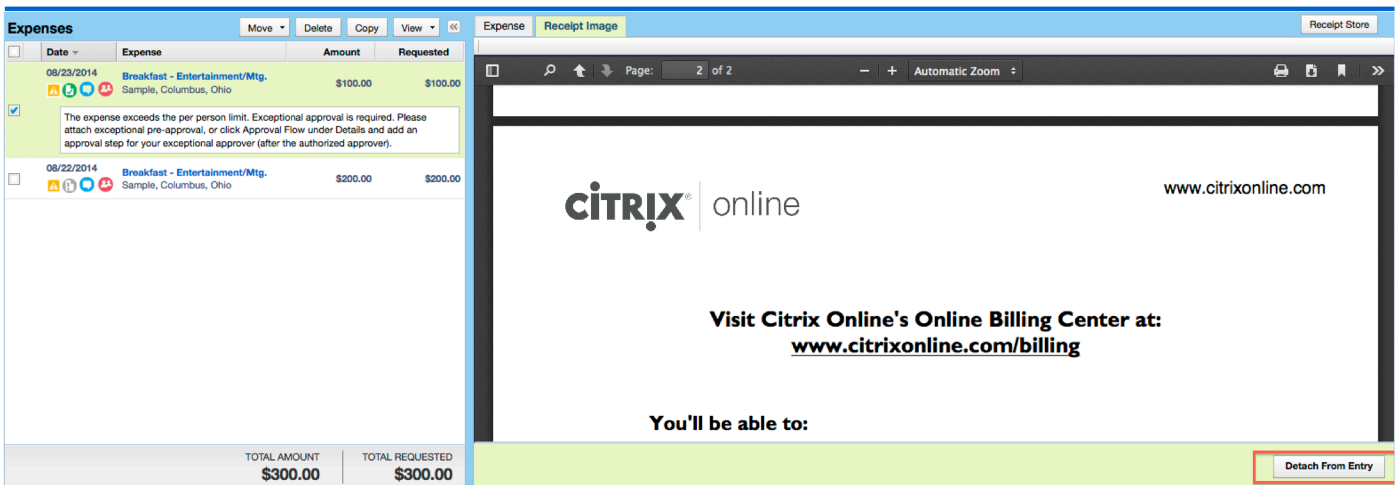


Remove Receipt: Complete Steps 1 & 2

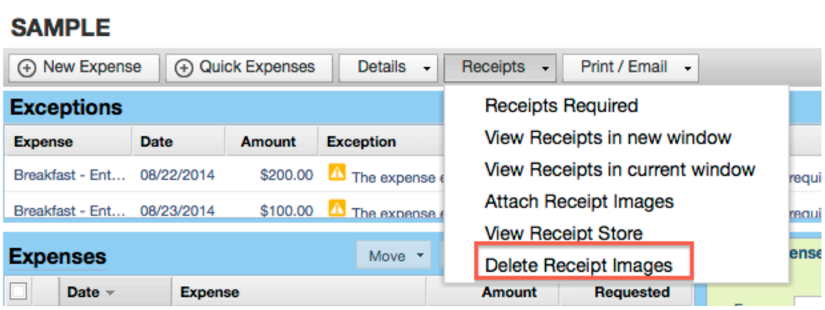
(1) To delete receipts, go into the line item where the PDF packet is added; this will be marked by a green receipt check mark indicating a receipt is attached. See below.



Once you have identified where the receipt is added, click on the top "Receipt Image" tab then go to the bottom right and click on "Detach from Entry."



(2)



Also, make sure to click on "Delete Receipt Images" to make sure there are no left over receipts still attached Receipts can be attached to a report without having a green receipt check mark. Make sure this step is completed.

Edit Receipts

-Please add receipts as a PDF packet. To prevent mistakes, do not attach receipts individually.

-**First step** in editing receipt PDF packet: Remove from MyExpense using steps above.

-**Second Step**: Make the necessary edits to desired receipts in the packet. Once the file is edited, use option 1 or 2 mentioned above to finalize the attachment. Overall, this will make redacting, editing easier, and prevent duplicates from occurring.

Best Practices

- Do not add to receipt store
- Use one PDF receipt packet
- Orient Upright
- Review before attaching & submitting