



Anesthesia Finance Office



How to Add, Remove, & Edit Receipts

MyExpense

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.

The screenshot shows the MyExpense interface. At the top, there are navigation tabs: My Concur, Expense, Profile, and App Center. Below that, there are links for View Reports, New Expense Report, View Receipt Store, Approve Reports, View Cash Advances, and New Cash Advance. A 'SAMPLE' header is present. A dropdown menu is open, showing options: Receipts Required, Check Receipts, **Attach Receipt Images** (highlighted with a red box), and View Receipt Store. The main content area shows a table of 'Exceptions' and 'Expenses'. The 'Expenses' table has columns for Date, Expense, Amount, and Requested. One expense is listed: 08/22/2014, Breakfast - Entertainment/Mtg., \$100.00, \$100.00. To the right, there is a 'New Expense' form with a search bar and a list of 'Recently Used Expense Types' including Breakfast - Entertainment/Mtg., Lunch - Entertainment/Mtg., Taxi/Shuttle, Registration Fees, and Lodging.

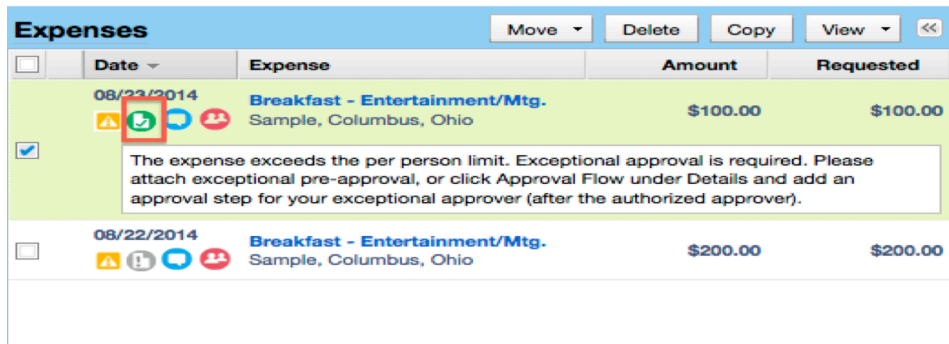
OR

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.

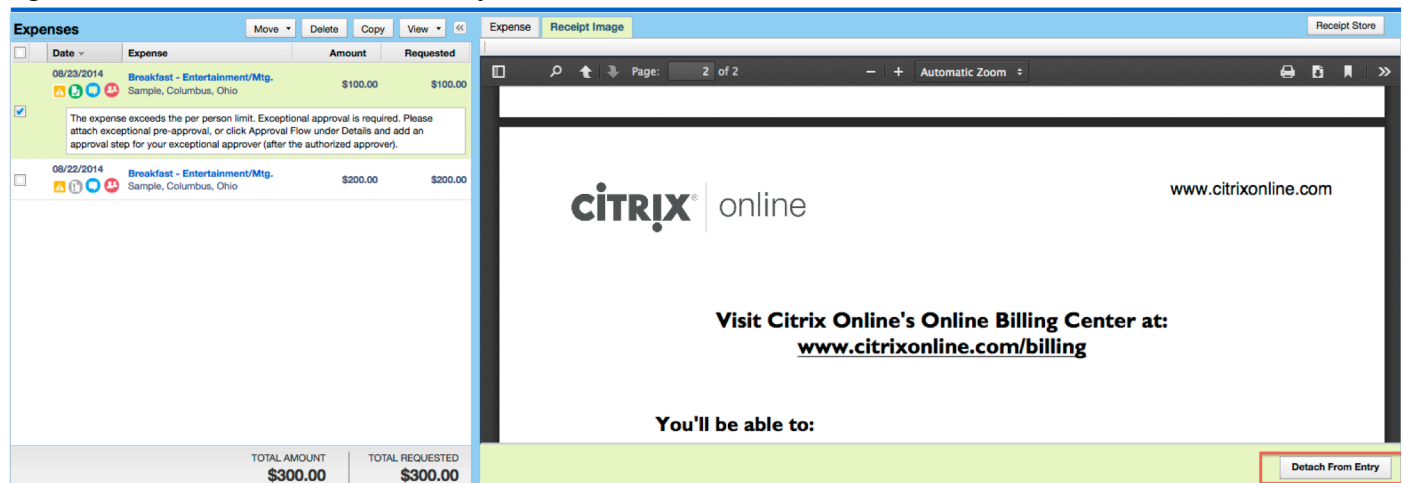
The screenshot shows the MyExpense interface for editing an expense. At the top, there are navigation tabs: My Concur, Expense, Profile, and App Center. Below that, there are links for View Reports, New Expense Report, View Receipt Store, Approve Reports, View Cash Advances, and New Cash Advance. A 'SAMPLE' header is present. A dropdown menu is open, showing options: Receipts Required, Check Receipts, **Attach Receipt Images** (highlighted with a red box), and View Receipt Store. The main content area shows a table of 'Exceptions' and 'Expenses'. The 'Expenses' table has columns for Date, Expense, Amount, and Requested. One expense is listed: 08/22/2014, Breakfast - Entertainment/Mtg., \$100.00, \$100.00. To the right, there is an 'Expense' form with fields for Expense Type, Transaction Date, Business Purpose, Vendor Name, City, Payment Type, For Empl. morale-building, recognition, or appreciation event?, Amount, and Currency. Below the form, there is an 'Attendees' section with a table of attendees. The 'Attendees' table has columns for Attendee Name, Attendee Title, Company, Attendee Type, and Amount. One attendee is listed: VITE, LUIS G., This Employee, \$100.00. At the bottom, there are buttons for Save, Itemize, Allocate, **Attach Receipt** (highlighted with a red box), and Cancel.

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.

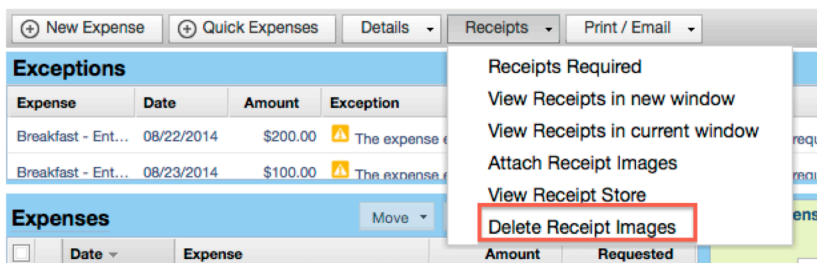


Once you have identified where the receipt is added, click on the top “Receipt Image” tab then go to the bottom right and click on “Detach from Entry.”



(2)

SAMPLE



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