Convert an Approved Request to an Expense Report

Once your request for estimated expenses has been approved and you are ready to submit the actual expenses for reimbursement, you can convert the approved request to an expense report.

1. Go to Approved Request
   - When you are ready to submit your actual expenses for reimbursement, find your approved request.
   - Log in to Concur.
   - On the home page, click Requests in the top menu bar.
   - View the list of your Active Requests to locate the approved request.

2. Convert Approved Request to an Expense Report
   Once you locate your approved request, in the Action column click Expense to convert it to an expense report (Figure 1).

![Active Requests (1)](image)

3. Complete Expense Report Header
   - You will be redirected to the Create a New Expense Report screen.
   - Some fields on the report header will be prepopulated with information from your approved request.
   - Since your request was for estimated expenses, be sure to review all fields in red and make any updates for the actual expenses (Figure 2).
   - For more information, refer to the tip sheet Complete the Expense Report Header.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
Figure 2

- When finished, click Next.
- In the pop-up window asking Is this a travel reimbursement? (Figure 3):
  - Click No for non-travel reimbursements.
  - Click Yes for travel or mileage reimbursements.

4. Continue Creating Expense Report

- Continue creating a travel or non-travel expense report.
  - You will need to add your expenses and attach your receipts and supporting documentation.
  - For more information, refer to the tip sheet Create a New Expense Report.

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