

Expense Reimbursements for Limited Term Employees and Students

Below are the guidelines of when it is appropriate to set up a limited term employee or student in Concur for expense reimbursement. Setting up a new user in Concur requires time for the completion of the paperwork by the Faculty or Department, training, and set up by the Finance Team. We want to ensure that setting up a limited term employee or student in Concur is appropriate based on the number of claims they will be submitting. If you believe the individual will be submitting two or more expense claims over the course of their contract or enrolment as a student, then we recommend setting them up in Concur. If the limited term employee or student will have less than two expense claims, please submit a [Manual Expense Claim Form](#).

How to Set Up a Limited Term Employee or Student in Concur?

Please complete a [Concur Request Form](#). They may require assistance with the default Fund/Org and Activity Code section.

Note: If the student is also an employee, have them fill out the Concur Request Form as an employee. This requires that they have an ontariotechu.ca email address.

Sign the form and submit it to Concur Support (concursupport@ontariotechu.ca). Concur Support (managed by Finance Systems) will set up the new user in Concur and will email the employee or student with instructions on how to login.

The new user will need to attend the next available “Concur Expense Training for New Users” training session. These sessions are run monthly by Finance Systems. A schedule of upcoming training sessions can be found on the [Finance Systems Training Registration](#) page. Once trained, the employee or student can get started on their Concur expense reimbursement report.

Training documents and How-To-Guides can be found on the [Concur](#) page on the Finance Website.

Training resources

Training documentation and how-to sheets

- [Guides for New Users](#)
- [Manage Concur User Profile](#)
- [How-To Guides](#)
- [Mobile Training Instructions](#)
- [Guides for Expense Approver/Reviewers](#)
- [Corporate Credit Card Reconciliation Instructions](#)