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When you give your time to Macmillan, we believe it’s important to make sure that you’re not out-of-pocket for doing so. We encourage all volunteers to claim their agreed expenses.

We have put this guidance together to help get you started with using our online expenses system, Concur, so that you can claim your expenses.

[This page on the Macmillan website](http://www.macmillan.org.uk/get-involved/volunteering/volunteer-expenses.html) contains all the essentials for understanding volunteer expenses: [**http://www.macmillan.org.uk/get-involved/volunteering/volunteer-expenses.html**](http://www.macmillan.org.uk/get-involved/volunteering/volunteer-expenses.html)

We recommend that you also read the expenses policy guidelines for volunteers and the full Macmillan expenses policy. Please contact your Volunteer Manager (your Macmillan contact) for a copy of the policy.

**Creating an account on Concur**

* Volunteer manager completes [**Expense set-up form volunteers and cancer voices**](https://macmillan89.sharepoint.com/:w:/r/sites/greenrooms/working-here/finance/_layouts/15/Doc.aspx?sourcedoc=%7B24155891-FC49-460E-A4D0-280F05D74A07%7D&file=Expenses%20set-up%20form%20(Volunteers%20%26%20Cancer%20Voices).docx&action=default&mobileredirect=true&DefaultItemOpen=1) (on Green Rooms) and emails to [**expenses@macmillan.org.uk**](mailto:expenses@macmillan.org.uk)   
  (If volunteer completes the form, send to expenses and copy in your volunteer manager)
* Expenses team set up volunteer on Concur
* Volunteer will then receive an automated welcome email from Concur with their log in details (a username and password to access your account)

**Setting up your account on Concur**

Follow these instructions the first time you log in and before you submit your first expense claim

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| **Visit the Concur homepage or app**  Click on this link - [**https://www.concursolutions.com**](https://www.concursolutions.com/) - to access the Concur logging in page.  Note: the first time you log in needs to be from a PC or laptop (not the Concur app) so that you can complete the set up of your Concur account | |
| **Log in to Concur – you will need your email address and a password**  Your email address is the one you provided on the set-up form (above)  Your first password will be supplied to you in a welcome email from Concur and on first log in you will be prompted to change this.  If you have not received an email with a password for Concur within 5 working days of submitting your set up form, please email [expenses@macmillan.org.uk](mailto:expenses@macmillan.org.uk) | |
| **Check your account details are all correct**   * Click on ‘Profile’ and ‘Profile settings’ (top right of the screen) * On the left-hand side, you will see ‘your information’ and ‘Expenses Settings’ headings, with several sub headings underneath * Click on each of the sub headings and check your details are correct * You can update some details yourself   If any of these details are incorrect and you cannot change them yourself email [expenses@macmillan.org.uk](mailto:expenses@macmillan.org.uk) before continuing and before you submit your first claim. | Or, follow these step by step instructions with screen prints - |
| **Add your bank details**   * Click on ‘Profile’ and ‘Profile settings’ (top right of the screen) * Under ‘expense settings’ on the left, select ‘bank information’ * Input your bank and personal details * Click save   **Note**: Concur will send a small test transaction (normally 1p) to verify the account details. You need to do this before you can submit your first expense claim. | Or, follow these step by step instructions with screen prints - |
| **Add car details (if driving)**   * Click on ‘Profile’ and ‘Profile settings’ (top right of the screen) * Select ‘personal car’ under ‘expense settings’ on the left * Click ‘new’ * Insert details: ‘business distance’ leave as 0; put your registration number in ‘vehicle ID’; and select ‘vehicle type’ from the drop-down list. * If this is your usual vehicle click ‘preferred’ and this will be set as your default vehicle * Click ‘save’ | Or, follow these step by step instructions with screen prints - |
| **Verify your email address**   * Click on ‘Profile’ and ‘Profile settings’ (top right of the screen) * Select ‘email addresses’ on the left-hand side * Select ‘verify’ from the drop-down list * You will receive an email with a verification code * Copy the code in the email in to the ‘enter code’ box * Click save | Or, follow these step by step instructions with screen prints - |
| **Update your email preferences**   * Click on ‘Profile’ and ‘Profile settings’ (top right of the screen) * Click ‘expense preferences’ on the left under ‘expense settings’ * Tick the boxes for the email alerts you wish to receive * Click save | Or, follow these step by step instructions with screen prints - |

**Concur app**

Now that you have set up your Concur account, you can now make claims using the Concur app as well.

You can download the Concur app for free on your smart phone or tablet.

Instructions on how to download the Concur app to your own device are available on the Concur website: [**http://www.concurtraining.com/customers/tech\_pubs/MobileDocs/Intro\_Mobile\_Android.pd**f](http://www.concurtraining.com/customers/tech_pubs/MobileDocs/Intro_Mobile_Android.pdf)

Once you are happy with your set up, please start claiming your expenses.   
Keep reading for information on how to claim your expenses.

**How to claim expenses using Concur**

We have put together the following guidance on making some common expense claims:

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| --- | --- |
| **How to set up an expense claim (‘claim header’)**  Firstly, you need to set up a new ‘claim header’ or ‘batch’ and give it a name e.g. September 2015 expenses  This is an online folder where you can then add all your individual expenses (e.g. mileage, train travel, lunch) to this folder and submit them all together when you are ready  Note: it is also more cost effective to Macmillan to submit claims together like this i.e. in one claim header. | Follow these instructions to create a ‘claim header’ |
| **How to claim mileage**  This document has step by step instructions with screen prints on how to claim mileage  (first you will need to add your vehicle in account set up, see above) |  |
| **How to claim for a train or bus journey**  This document has step by step instructions with screen prints on how to claim for a train or tube journey.  The instructions for completing a claim are the same for a bus journey, except you need to select ‘bus’. |  |
| **How to upload a receipt to Concur**  There are different ways that you can upload your receipts to Concur. You can upload and save them in a folder called the ‘receipt store’ ready to attach to your expense claims.  Follow these step by step instructions with screen prints. |  |
| **How to make a claim when a receipt has two expense types**  If you have a receipt that has two expense types on it (e.g. tube travel and train travel) these need to be entered separately on to Concur but using the same receipt.  To do this you need to ‘itemise a receipt’ – follow these instructions |  |
| **Cannot attach receipts**  If you have your receipts but you do not have access to a scanner / camera to attach them to your expense claims, you need to use the “missing receipt declaration” on Concur.  Note: this applies for individual claims of £20 or under; and you must keep your receipts for 6 months.  If an individual claim is more than £20 please speak to your volunteer manager for support in scanning the receipt to attach to your claim  Please follow the instructions on the right. |  |
| **Lost receipts**  If you have lost a receipt and reasonable steps have been taken to obtain a copy, or if a receipt was never provided, please use the “missing receipt declaration” on Concur.  You must add a comment to note that the receipt has either been lost or is missing. This applies to receipts of any value.  Follow the instructions on the right. |  |
| **How to submit an expense claim**  When you have entered all your expenses you are ready to submit them, following these instructions |  |
| **How to recall an expense claim**  If you have made an error, you can recall an expense claim following these instructions |  |
| **Expense symbols** This document provides a key to the symbols used on Concur |  |

**Top Tips**

To help speed up the approval of your expenses and to minimise errors which prevents them from being returned to you, we recommend the following:

* Make sure that the date you enter on your expense claim matches the date printed on your receipt
* If scanning/taking a photo of your receipts – make sure the photo is clear (not blurry) and the date on the receipt is clearly visible
* Make sure your receipts are itemised receipts (they should show what you have bought and how much), not the card receipt as these will be rejected by Concur. If you do not have an itemised receipt, submit your claim using the “missing receipt declaration” (see above guidance)

**What happens next?**

Once you have submitted your claim, it will be sent to Concur who will check the accuracy of the claim.   
Once checked, the claim will be sent to your Volunteer Manager (your Macmillan contact) to approve.   
Once your Volunteer Manager has approved the claim it will be sent for payment by BACS transfer.  
  
It can take up to **two weeks** for your claim to be paid, assuming there are no issues with the accuracy of your claim.

Please also see the following documents:

|  |  |
| --- | --- |
| **How to check where my claim currently is**  You can check on the progress of your claims by following these instructions |  |
| **The life cycle of an expense claim**  For information, the life cycle of an expense claim is outlined in this simple diagram |  |

**Additional info**

* Macmillan expenses policy
* Expenses policy guidelines for volunteers
* Expenses info on the Macmillan website: [**http://www.macmillan.org.uk/get-involved/volunteering/volunteer-expenses.html**](http://www.macmillan.org.uk/get-involved/volunteering/volunteer-expenses.html)

**Questions and support**

If you need to contact someone for help with your claim, please email [expenses@macmillan.org.uk](mailto:expenses@macmillan.org.uk)

You can also contact Concur directly on 020 3793 6933. Or your Volunteer Manager (your Macmillan contact) may be able to provide support including showing you how to use Concur, please contact them directly.

For reference:

**Version:**  v1.2  
**Resource last updated:** January 2020  
**Review date:**  January 2022   
**Updated by:**  Cherie Davison, Volunteering Improvement Adviser   
**Questions [about subject of resource]:** Contact your [**Volunteering Improvement Adviser**](https://macmillan89.sharepoint.com/sites/greenrooms/tools-and-resources/working-with/volunteers/Pages/YourVolunteeringAdviser.aspx) **Feedback about this resource:** Email the [**Volunteering Quality Team**](mailto:mvqs@macmillan.org.uk)