Creating an Expense Report for PPE



Objective: In this section we will go over how to use Concur to reimburse a Personal Protective Equipment (PPE) expense.

1. On the **Report Header**, choose *Other Reimbursement* for *Policy* and *Other Reimbursement* for *Trip Type*. Fill out the rest of the required forms and **Select** Next.



You do not need to have a Request attached to your expense report to proceed when processing PPE reimbursement

You can leave the Report/Trip Start and End Date fields

Create New Report

Create From an Approved Request

Policy*

*Other Reimbursement

Trip Type*
Other Reimbursement

K

Report Total*

Bu

blank.

2. Select the Add Expense

PPE - \$0.00	Submit Report Delete Report
Not Submitted Report Number: WNTD4H	
Report Details 🗸 Print/Share 🗸 Manage Receipts 🗸 Travel Allowance 🗸	View Available Receipts []
Expenses View: Standard	G Add Expense Edit Delete Copy Allocate Combine Expenses Move V

3. Choose the expense type:

- PPE Safety Shoes
- PPE Safety Eyewear
- PPE Other

Be sure to complete all required fields marked in red.



Shipping fee is reimbursable.

The following are the maximum allowable reimbursement limits (sales tax not included) for safety footwear and prescription safety eyewear, effective as of June 1, 2016:

- \$175 for safety footwear
- \$100 for resoles of safety footwear
- \$210 for prescription safety eyewear

Add Expense to Report

New Expense Available Expenses (0)

Select an expense type for the new expense

PPE

Search by expense type, category, description

✓ Recently Used				
∧ 04. Other				
PPE - Oth	er			
PPE - Safe	ety Eyewear			
PPE - Safe	ety Shoes			
•				



4. Select Itemizations after completing Details. Itemize PPE and Sales tax separately.

PPE - Safet	y Shoes \$188.00			Save Itemizations Can
	_			Hide Receipt
Details Itemizations			Rec	ceipt
Amount \$188.00	Itemized \$0.00	S Remaining \$188.00		
SLAC - PPE Safe	ty Shoes and Sales Tax		* Required field	
PPE - Safety Shoes * 175.00		Personal Expense (do not reimburse)		
Sales Tax *				· •
13.00		Personal Expense (do not reimburse)		- Ching
(Amounts in USD)				<u> </u>
				Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
Save Itemizations Save Save Save Save Save Save Save Save	ave and Add Another Cancel			Add Receipt

- 5. Select *Add Receipt*. Attach <u>PPE Purchase Approval Form</u> and the receipt for PPE purchase.
- 6. Select *Sales Tax* and Select *Allocate*.

Details	Itemizations			
Amount \$188.0	00	Itemized \$198.00	Over \$10.00	
Itemi	zations		Create Itemization Edit Delete Copy	Alloca
	Date↑≞	Expense Type↓↑	Requested↓↑	
\Box	02/10/2025	PPE - Safety Eyewear	\$180.00	
 Image: A start of the start of	02/10/2025	Sales Tax	\$18.00	



7. Select *Add* and allocate PPE sales tax to **Project Activity: 12002- S0001**.



8. After allocating sales tax to 12002-S0001 PA, Select Save.

Allocat	e							×
Itemizatio	ons: 1 \$13.0	00 View Allocatio	on Group					
	Percent		Amount					
Amount \$13.0	t 00			Allocated \$13.00 100%		Remaining \$0.00		
Defaul	lt Allocation							
Code								Percent %
Alloca	ations (1)						Add Edit Remove	Save as Favorite
	Project↓↑	Activity↓↑	WBS↓↑	Fund↓↑	Codeî≞		Р	ercent %
✓	12002	S0001	10.99.01.53.01	YN0100000	12002-S0001-10.99.01.53.01-YN0100000		100	
								Cancel Save

9. When finished, Select Submit Report.

PPE	- \$188	3.00			Submit Rep	ort Copy Report	Dele	te Report	
Not Subr	mitted Repo etails 🗸 Print	rt Number: WNTD4H t/Share 🗸 Manage Receipts	✓ Travel Allowance ✓	View Available Receipts					
Expe	enses View:	Standard	~	Add Expense	Edit Delete Copy Allocate	Combine Expense	s M	ove 🗸	
0	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓ [∓]	Requested↓↑		~	
0	Personal Card/Cash		PPE - Safety Shoes		03/24/2025	\$188.00 Allocated Itemized		~	
						\$188.00			