Adding Receipts in MyExpense

UCSF Supply Chain Management

This job aid describes how to add receipts to an Expense Report in **MyExpense**.

Logging into MyExpense

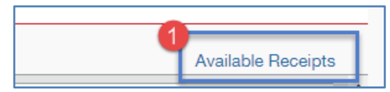
If you are not already logged into **MyExpense**, log into MyAccess. Scroll down to locate and select **MyExpense** from the applications menu. If you have set MyAccess to display "Favorites", you may need to change to "All Apps" or search for **MyExpense**. The **MyExpense** homepage will display in a new tab.

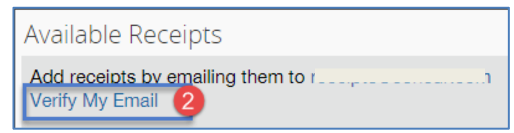
Ways to Attach Receipts to an Expense Report

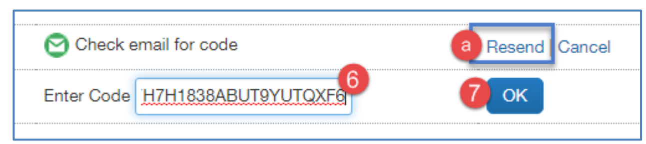
You can attach receipts to your Expense Report in three ways. All three methods are accessible from the Expense Report entry screen as well as at Final Review.

Email	Use this method to email receipt pictures (.JPG or .PDF) from a computer, smartphone or tablet during travel making them immediately available to attach to your Expense Report after your trip
Upload Image File	Use this method to attach scanned receipts that are available on your computer
Fax Using Custom Cover Page	Use this method to create a custom cover page that identifies your faxed receipts with your **MyExpense** profile

Email Receipts to MyExpense as an Attachment







Before you can email receipts, you must verify your email address in **MyExpense**. From the Expense Report entry screen:

1. Click the **Available Receipts** link on the right-hand side of the page; the **Available Receipts** pane displays
2. Click the **Verify My Email** link; your profile page automatically displays the email verification section
3. Locate the line with your UCSF email address and click **Verify**. You will receive an email from **MyExpense** (the email comes from donotreply@concur.com)
4. Click **OK** on the Verification Email Sent pop-up and then check your email (not shown)
5. Find and copy (CTRL + C *or* right-click > copy) the verification code in the body of the email you receive from **MyExpense**
6. In your **MyExpense** profile, paste (CTRL + V or right-click > paste) the copied code into the **Enter Code** field
7. Click **OK**
   - a. If you do not receive an email from Concur, click the **Resend** link and try verifying again

Once your email address is verified, you can begin emailing receipts **from your verified email address** to the address shown in **MyExpense**. Attach receipt(s) to the email and send; a subject line is not required. Emailed receipt images display in the **Available Receipts** menu within a few minutes and are retained until you attach them to an Expense Report or delete them. See the section **Attaching Available Receipts** on page 4 for detailed instructions on attaching these receipts to a specific report expense line.

If you plan to send receipts from other email addresses, repeat step 1 and then click the **[+] Add an email address link** to the right of your UCSF email address. Enter the additional email address into the box that displays and then click **OK**. Repeat to add more email addresses. Follow steps 3 - 7 to verify each address. A unique verification code is required for each email address. You can send email attachments to **MyExpense** from any of the verified email addresses.

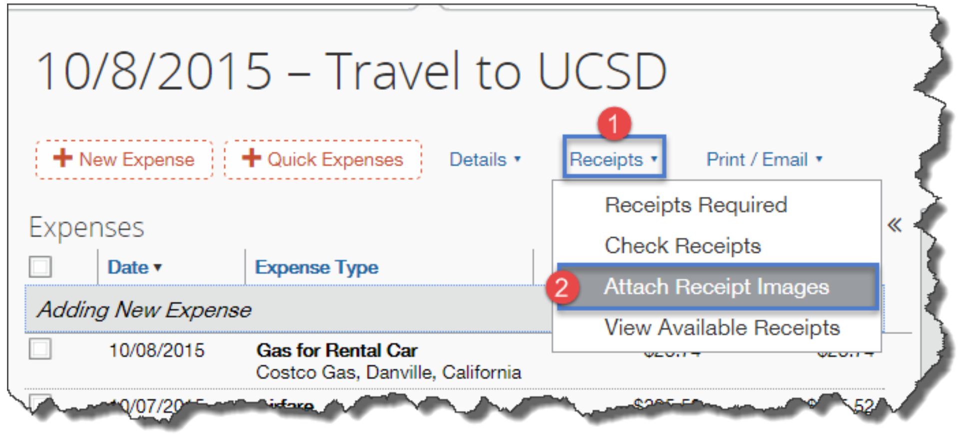
Upload a Receipt Image File from Your Computer

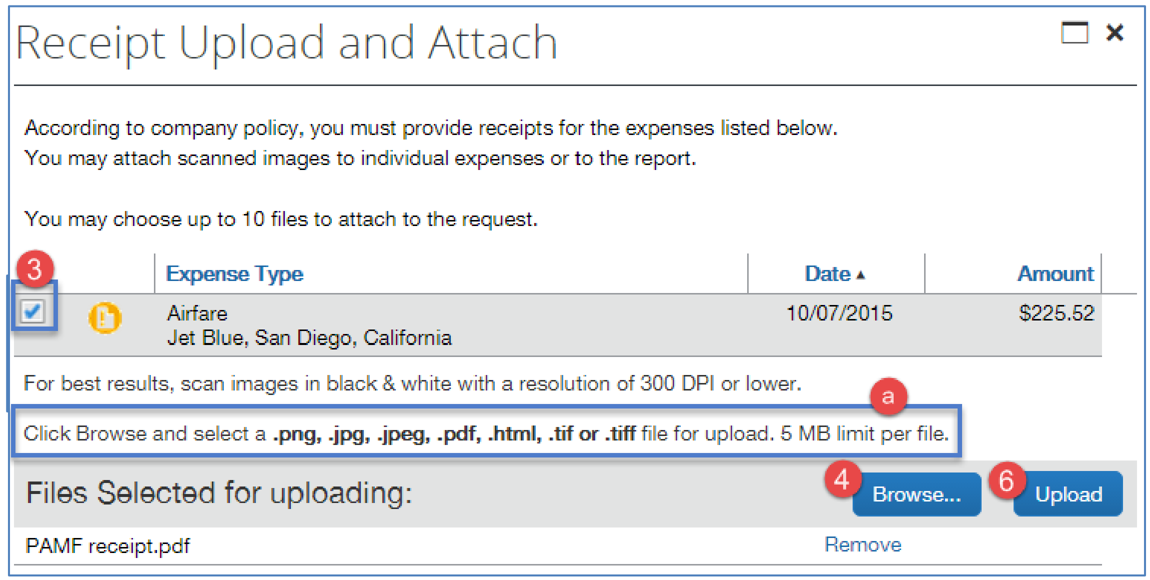
Adding Receipts in MyExpense

To upload scanned PDF images of receipts saved on your computer; from the Expense Report screen:

1. Click the **Receipts** drop-down menu:
2. Click **Attach Receipt Images;** the Receipt Upload and Attach window display
3. Expense lines from your report are displayed. Check the appropriate box for the receipt. If a receipt contains multiple expenses, click all appropriate checkboxes

   Click the **Browse** button
4. Use your computer's file explorer to locate and select the receipt image file you want to upload (not shown)
   - a. **MyExpense only accepts files saved in the formats displayed. .PDF format is preferred.** The image size **must be 5 MB or less**.
5. Click the **Upload** button to complete the transfer of the receipt
6. The receipt image preview displays; click the **X** in the right-hand corner to dismiss (not shown) or allow the preview to expire and close automatically





The receipt image is now attached to the selected expense line and a receipt exception icon displays as a blue checkmark instead of an orange one.

Repeat this process as necessary, or use any combination of the other methods outlined in this job aid, until all required receipts have been attached to your **MyExpense** report. Continue to select workflow options and submit the report using the steps detailed in the **Submitting Your Expense Report** job aid.

Adding Receipts in MyExpense

Faxing Receipts Using the UCSF Custom Fax Cover Page

To fax physical receipts to **MyExpense**, from the Expense Report screen:

1. Click the **Print/Email** drop-down menu
2. Click **UCSF Fax Receipt Cover Page;** the Fax Cover Page displays in a new window

   Before you print:

   - Use the **highest resolution** possible on your printer
   - Print the cover sheet on **plain white** paper
   - Print in **portrait** orientation, not landscape
   - After printing, check to ensure the printout is dark and clear with no smudges, streaks, or marks

3. Print the cover page using **Print** button

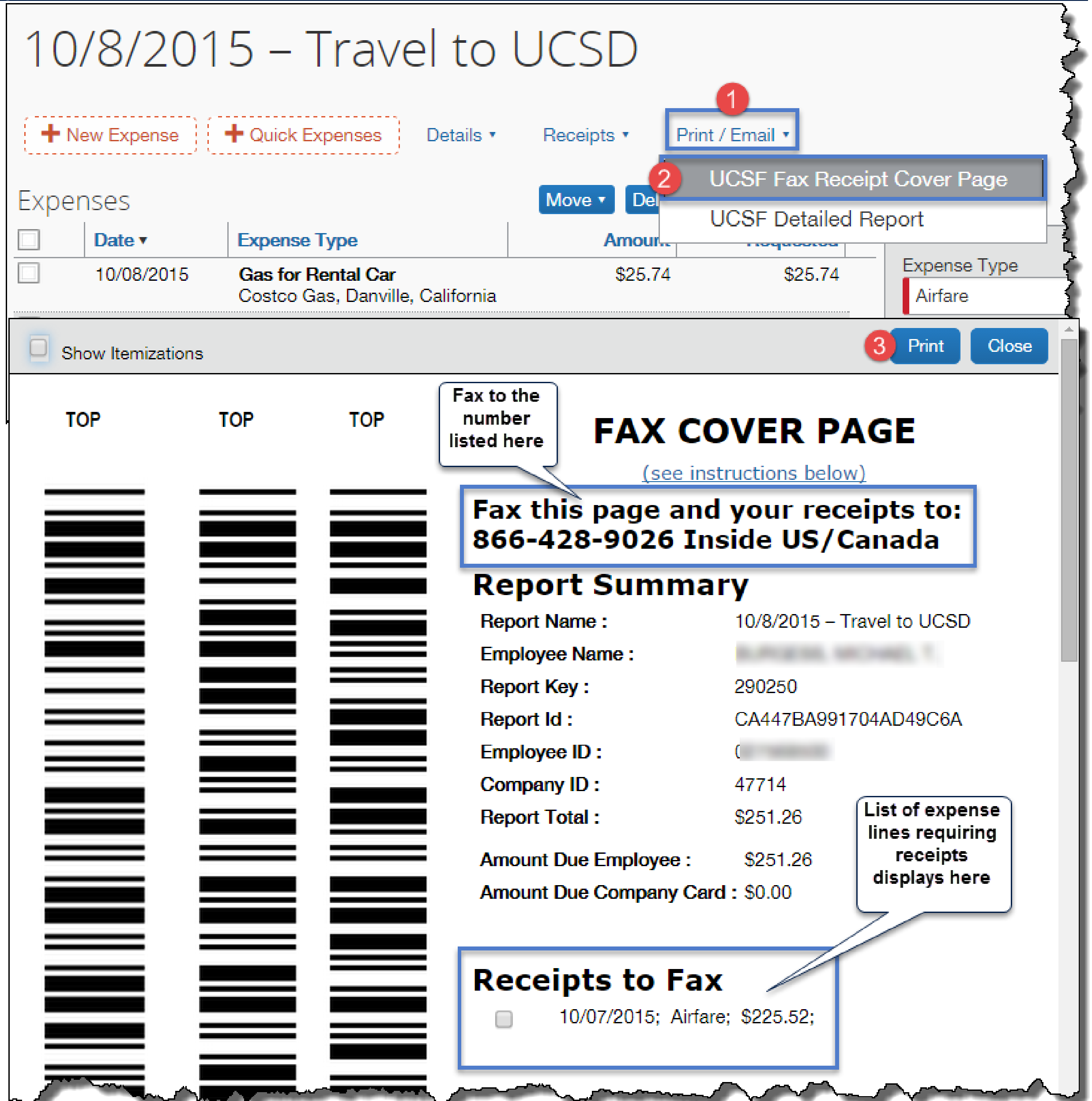
Fax your receipts behind the printed cover page to the number listed. Be sure you **do not cover** any of the three bar codes on the cover page. These identify your specific **MyExpense** profile and report.

We suggest you tape receipts to blank pages or use a clear fax jacket to ensure receipts are not accidentally damaged by the paper feeder. Be sure that all sheets are facing the correct direction for your fax machine (most often face down).

Wait a few minutes and then confirm the fax was received by clicking the **Available Receipts** link. You should see thumbnails of your faxed receipt images. Try faxing the images a second time if the receipts do not display.

Once your faxed receipt images are available, continue to the **Attaching Available Receipts** section for instructions on applying receipts to specific expense lines.

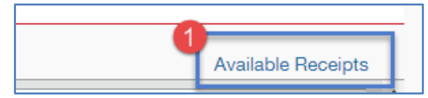
Repeat this process as necessary, or use any combination of the other methods outlined in this job aid, until all required receipts have been sent to **MyExpense**, and then continue to select workflow options and submit the report using the steps detailed in the **Submitting Your Expense Report** job aid.



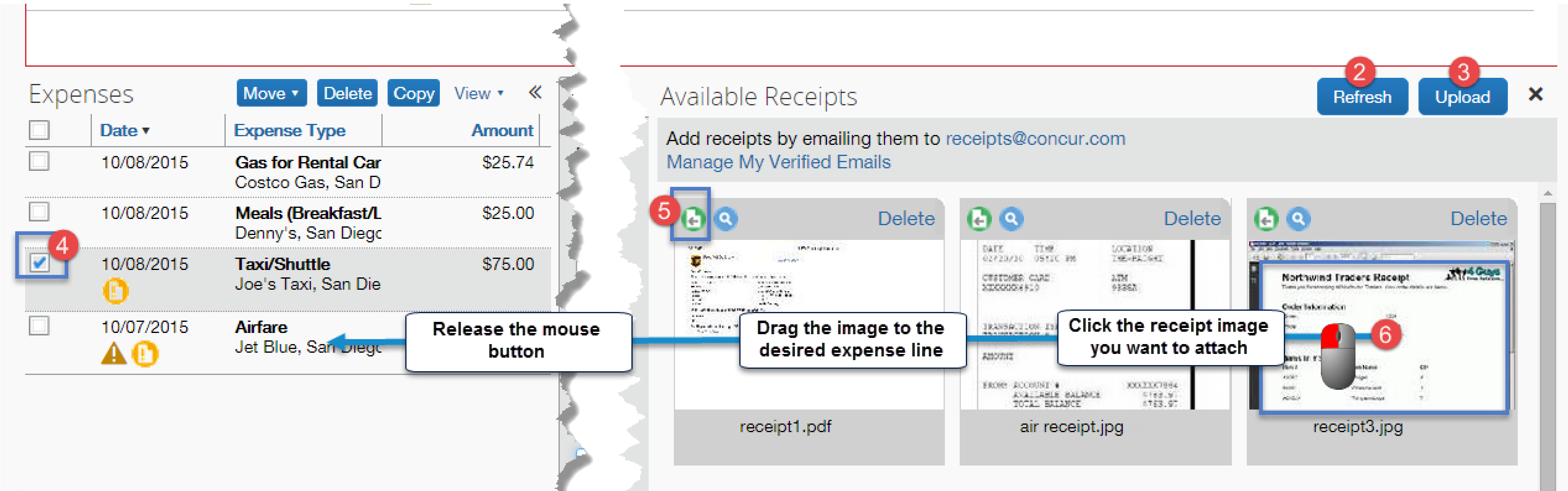
Adding Receipts in MyExpense

Attaching Available Receipts

Any receipt image added using the instructions in this job aid that have *not* been associated with an expense line on a report will display in the **Available Receipts** window. To access and attach an available receipt to an Expense Report, from the Expense Report window:



1. Click the **Available Receipts** link on the right-hand side of the page; the **Available Receipts** pane displays receipts available as thumbnail images



2. If you have faxed or emailed a receipt recently and it is not displayed, click the **Refresh** button to check again and repeat as necessary
3. If necessary, you can upload additional images from your computer by clicking the **Upload** button and following the steps in the **Uploading a Receipt Image File from Your Computer** section of this job aid

There are two ways to attach an available receipt to an expense line:

4. Checkbox method:
   a. Click the checkbox for the expense line that requires the receipt
   b. Click the icon in the upper left-hand corner of the associated receipt image you want to associate with the selected line

   OR

5. Drag and Drop method: Click the image of the receipt you want to attach and hold the mouse button, drag the image over the desired expense line, and release the mouse button

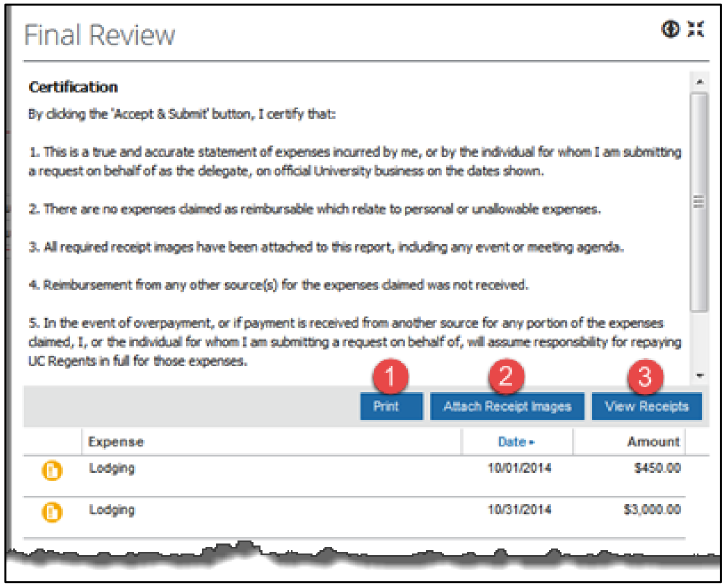
Repeat the process as necessary to attach receipts to all required expense lines. Continue to select workflow options and submit the report using the steps detailed in the **Submitting Your Expense Report** job aid.

Adding Receipts in MyExpense

Attaching Receipts at Final Review

If you forgot to attach required receipts to an Expense Report before clicking **Submit**, you have another chance to add them directly from the **Final Review**. You can use any combination of these methods:

1. Click the **Print** button to add a faxed receipt and follow the directions in the **Faxing Receipts Using the UCSF Custom Fax Cover Page** section of this job aid
2. Click the **Attach Receipt Images** button and follow the directions in the **Upload a Receipt Image File from Your Computer** section of this job aid
3. Click the **View Receipts** button and follow the directions in the **Attaching from Available Receipts** section of this job aid



Accounts Payable Helpdesk Center SCMAP@UCSF.EDU or (415) 514-4100