Concur Guidance for Volunteers

Table of Contents

Step by step

1 **Log into Concur**

We will create your account when you join Macmillan. You will then receive a welcome email from Concur which contains your password. Visit the [Concur website](#) to access the Concur login page. You will need to log in with the password that you received in your welcome email, and the email address to which it was sent.

For added security, you will be prompted to set up 2-Factor Authentication (2FA) upon your first login. You will also be sent instructions and guidance on this in the welcome email. Follow the step-by-step guide to complete the 2FA setup, which typically involves linking your account to a mobile authentication app or receiving a code via SMS. Once 2FA is configured, you will need to enter the verification code generated by your chosen method each time you log in.

2 **Set up your account**

Once logged in, check that all your account details are correct and then add your bank details (see page 3). If you're going to be claiming for travel by car, add your car details here too (see page 5). Make sure to verify your email address and update your email preferences. Once you're happy with how your account is set up, you're ready to go.

3 **Make an expense claim**

You're now ready to make a claim for any reasonable out-of-pocket expenses that you've incurred whilst volunteering.

You'll need to let us know:

- how much you're claiming
- the date that you incurred this expense
- what the expense is for

We will also need to see your receipt – just a photo will do. You can complete the entire expense claim either via the Concur app on a smartphone or tablet, or by visiting the [Concur website.](#)

4 **We process your claim**

Once the claim has been created it will then be moved forward for processing. If there are any mistakes on the expense claim - such as the date not matching the receipt - your claim may be delayed whilst we work with you to correct the mistake. It's important to us that our volunteers are reimbursed as soon as possible, therefore we make every effort to ensure delayed claims are still processed **within two weeks**.

# How to add or update your bank details on Concur

If you have a new Concur account, you will need to add your bank details to be reimbursed expenses.

If your bank details change at any time, you will need to update them on Concur directly, as the system is not linked to any others.

On the homepage, click the icon in the top right with your initials in, and click Settings.
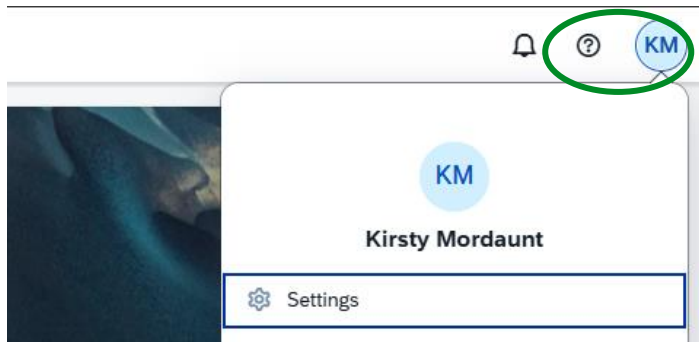
From here, click Bank Information
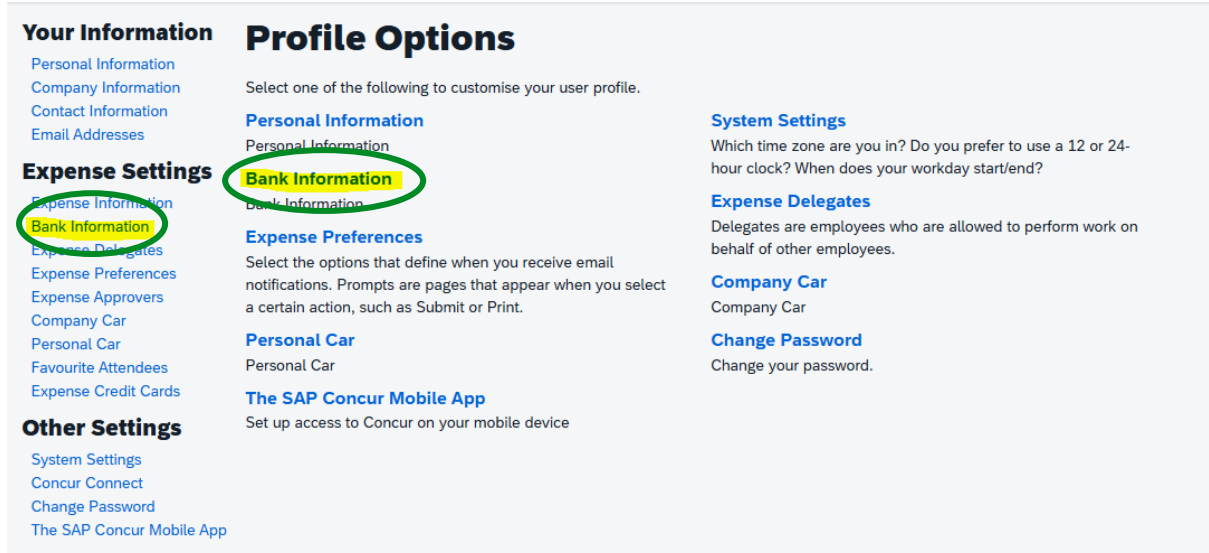
You will need to fill in all required fields with a red * next to them.

Bank Information

Bank Country/Region *
UNITED KINGDOM

Bank Currency
UK, Pound Sterling

Sort Code *

Account Number *

Bank Name *

Branch Location *

Status

Active *

Full Legal Name of Account Owner *

Building Number and Road

Building Name
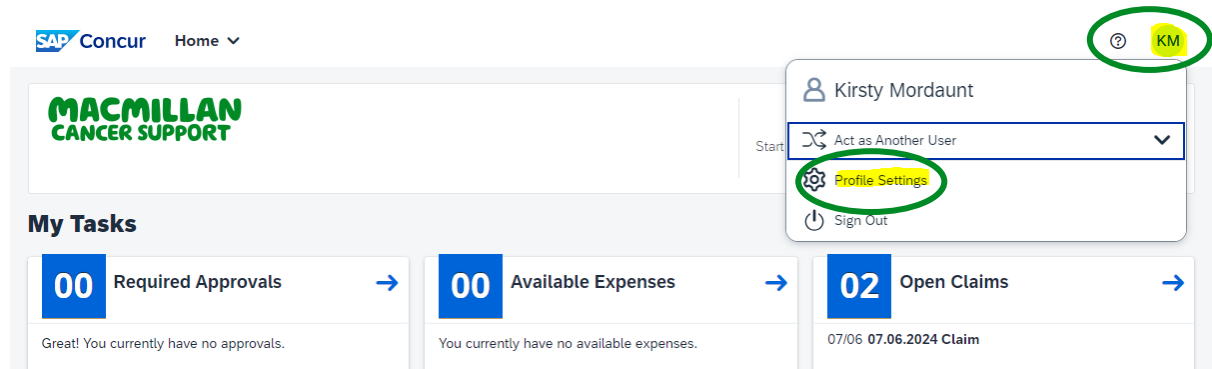
Town *

Locality

Postal Code *
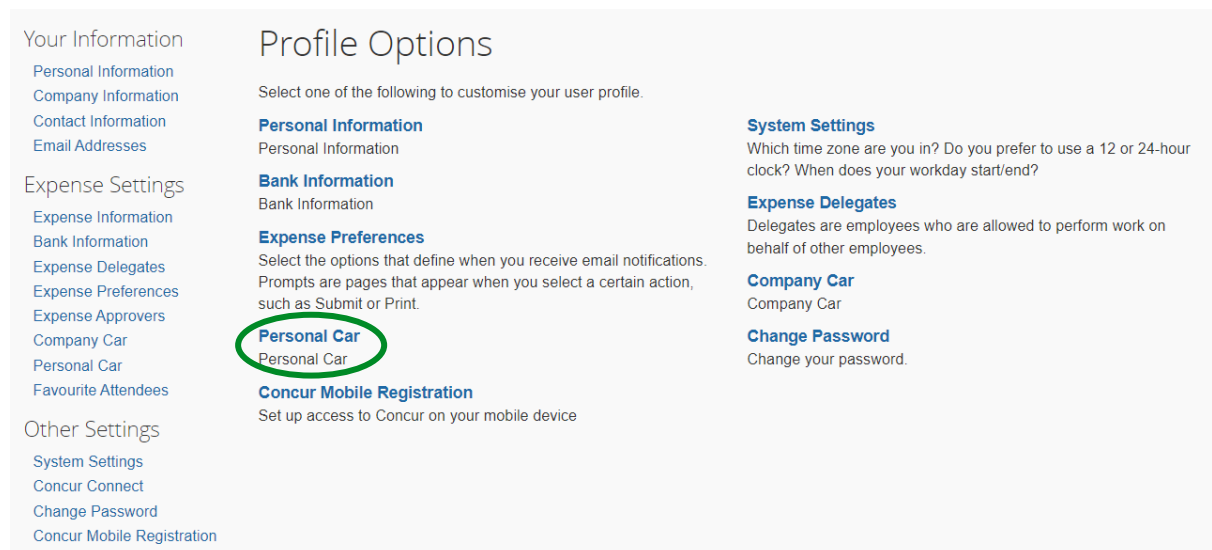
Save and Authorise

Then click Save and Authorise.

How to set up a vehicle

How to set up a Car

Click on the 'Profile' icon with your initials, then 'Profile Settings'

All cars are split into two categories. **Volunteers** should choose **Personal Car.**

Select **'New'**

Input your car registration number under Vehicle ID, choose the Vehicle Type in the dropdown menu and if this is your new default car, click **'Is Preferred'**

Click **Save**.

Vehicle Types

The Vehicle types are by engine size for Petrol, LPG and Diesel, and Electric Cars are split into Home Charging and Public charging – this is to mirror the [HMRC advisory rates](#),

and allows us to report on our environmental impact. Hybrid cars are treated as either petrol or diesel cars for advisory fuel rates.

If you both home and public charge your Electric car depending on your volunteer activity, you can add the same car as both types (with a name that helps you identify it) and choose the correct one when claiming.
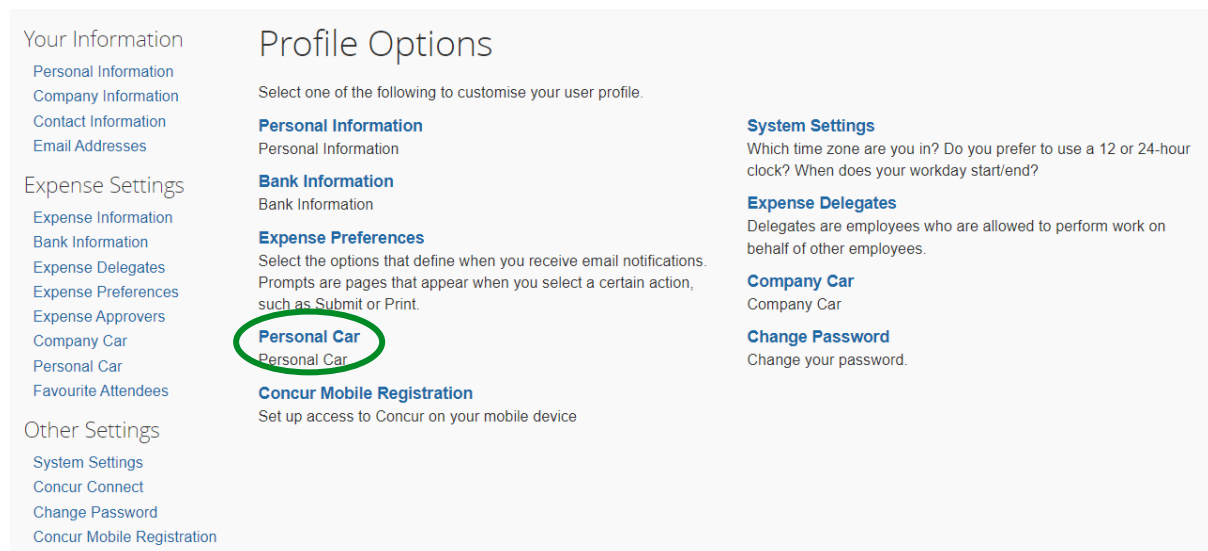
How to set up a Motorcycle or Bicycle

Private Motorcycles and Bicycles can claim mileage for necessary journeys – see the Expenses Policy Appendix A.

To add one of these as an option click on the 'Profile' icon with your initials, then 'Profile Settings'
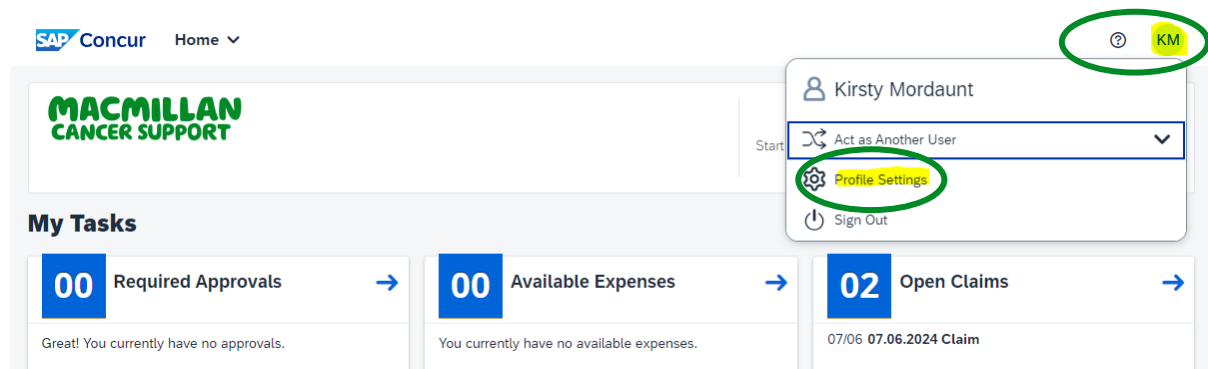
Select **'Personal Car'**.

Select **'New'**

Add a registration number or similar unique identifier into the Vehicle ID, and under the Vehicle Type dropdown menu choose either **Motorcycle** or **Bicycle.**

If this is your preferred vehicle click **'Is Preferred.'**

Click **Save**.

To claim Bicycle Mileage, choose **'Car without an allowance'** and choose your bicycle from the vehicle Ids if it is not your default.

To claim Motorcycle mileage, choose **'Private Motorcycle Mileage'** and ensure your Vehicle ID is your Motorcycle.
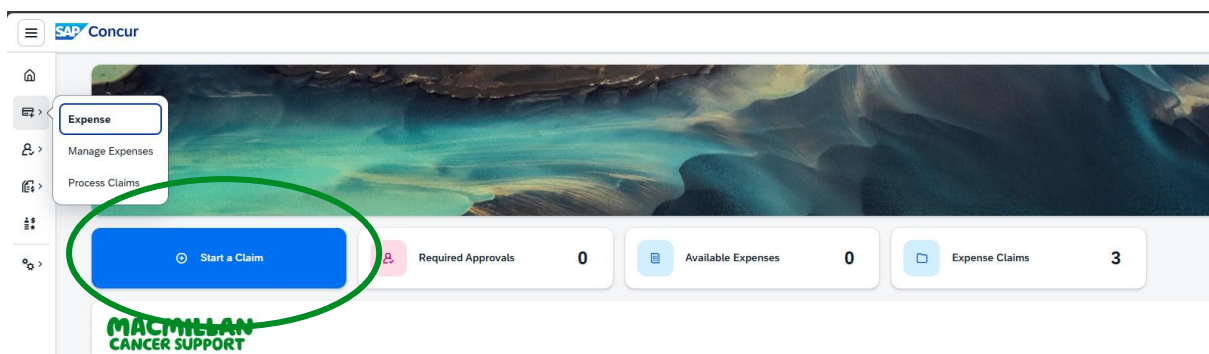
How to create, submit and troubleshoot an expense claim
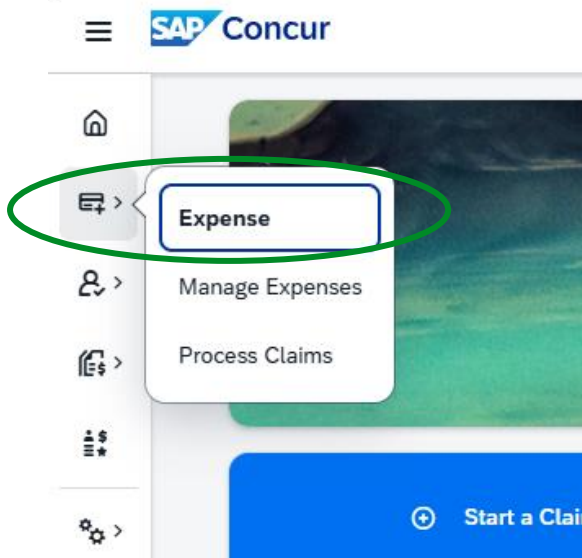
How to create a claim

Creating a new claim

There are two ways to start a new expense claim.

1st way: Click the Start a Claim button. This may also show as Start a Report if your language is set to US English.
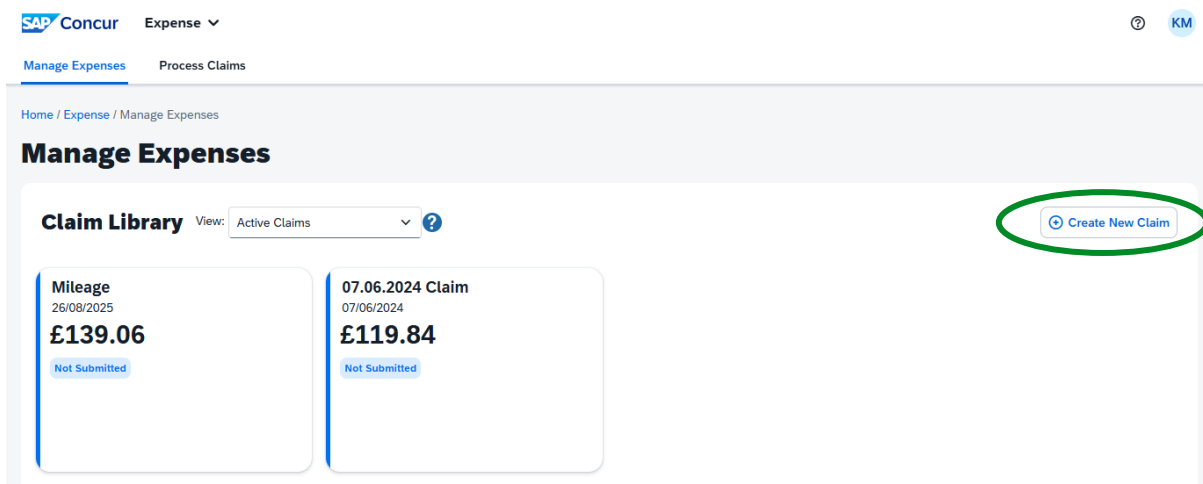

2nd way: Click the credit card icon along the left hand side of the screen.

This will take you to a page that shows all your current expenses in progress.

Click Create New Claim (this can show as Create New Report depending on language settings)

A new window will pop up for you to complete

Claim Name: Give your claim a name, e.g. Travel January 2023. Leave the 'Claim Date' as today's date.

Business Purpose: this should have a short explanation of what incurred these costs.
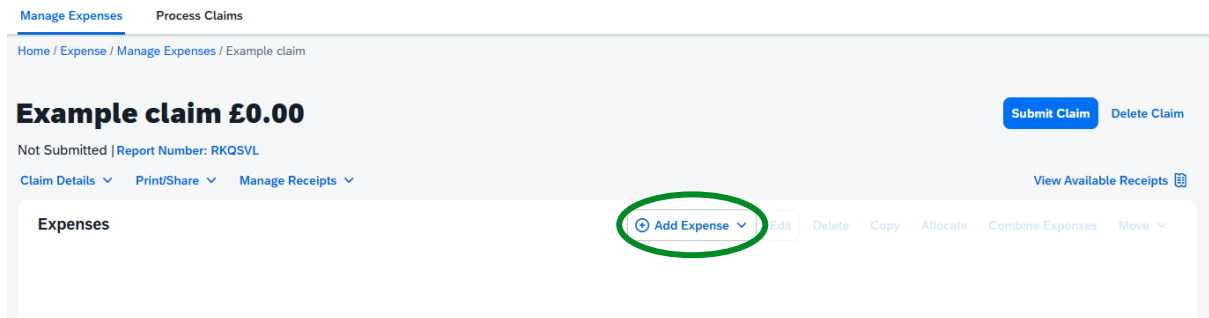
Comment: can be left blank

Project Code: only needs to be completed if you want your entire claim to come from a budget code that is not your usual volunteer role. If you have lines within the claim that relate to different volunteer roles, this can be changed later and the 'project' field can be left blank here. If the one you need is not listed, please email volunteerenquiries@macmillan.org.uk to get it added.

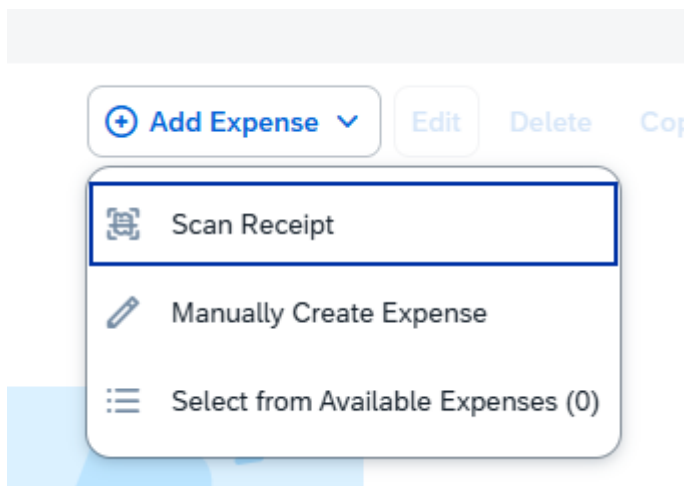Once you have filled in all the required fields, click Create Claim

From here you will be taken to an empty claim with the name you chose.

How to add expenses

To add expenses to it, click the add expense button.

You will have a two options:

- **Scan Receipt** (upload image and AI will extract a best guess from it)
- **Manually Create Expense** (and upload receipt from images, or input mileage)

To Manually create an expense:

Here you can search by expense type. Start typing in to search – for example 'mileage' will find Cars with an allowance and also Private Motorcycle mileage

Click the expense type you wish to claim.

Example: Bus:

From this screen, go through and fill out every required field with a red asterisk* next to it.

Notable fields

Business Purpose: The Business Purpose field in Concur is a mandatory field. This should be a clear explanation of why this expense was incurred - It always needs to include enough information so the approver and the tax auditor is able to confirm that the claim is in accordance with Macmillan's Expense Policy and the HMRC regulations. Be as specific and accurate as you can.

Examples of useful information are:

- Claim name clearly describes contents of claim and time period

- Details of a journey taken and why

- Name and location of event volunteered at

- Reason why expense was incurred (eg taxi taken due to carrying heavy event kit)

Comment: You can put additional information here if required to explain the business purpose.

Transaction Date: this should be the date the expense was incurred and should match the receipt.

Project Code: only needs to be completed if you want your entire claim to come from a budget code that is not your usual volunteer role. If you have lines within the claim that relate to different volunteer roles, this can be changed later and the 'project' field can be left blank here. If the one you need is not listed, please email volunteerenquiries@macmillan.org.uk to get it added.

Upload Receipt Image: Receipts should be clear, with the date visible, easy to read and itemised.

Note that receipts are checked by Concur audit – ensure that your receipt matches the date of your claim and the amount, or if you are claiming part of the full receipt, that this is noted in the comments.

How to itemise a receipt

Itemisations: If a receipt is for more than one kind of expense, you can click the Itemisations tab to split it out.

From here, click Add Itemisations

And choose the expense type you want to allocate a cost to.

You will need to enter the amount of money you need allocated to this expense type.

You can also choose a **Project**. This Project Code only needs to be completed if you want your expense to come from a budget code that is not your usual volunteer role. If the one you need is not listed, please email volunteerenquiries@macmillan.org.uk to get it added.

The Comment field must be filled in.

Click Save Itemisation, and the screen will show you how much of the cost is left to be allocated out.

Repeat this process until the entire cost is itemised. The screen will show you £0.00 remaining.

Date↑≡	Expense Type↓↑	Requested↓↑
28/08/2025	Parking	£5.00
28/08/2025	Underground Rail/Tube Travel	£5.00

You can now go back to completing the Details tab, or save your expense.

Submitting a claim

Once you are happy with your claim, you can click Submit Claim in the top right

This will send the claim on to Concur Audit. Once they approve it will go to your manager, then the Expenses team who will do a policy audit check.

Approval steps

Pending Concur Audit Service – your claim is with Concur audit, who check that your claims match their receipts dates and amounts, and that receipts are clear and itemised.

Submitted & Pending Approval – your claim is with your manager. Their name will be visible on this step.

Approved & In Accounting Review – your claim is with the Expenditure team to check against the Macmillan Expenses Policy.

Troubleshooting

How to delete a claim

If you need to delete a claim or an expense, you can click Delete Claim in the top right
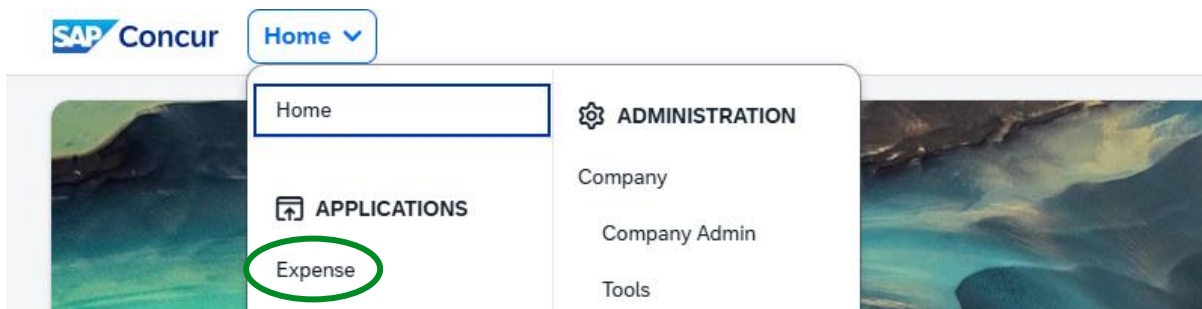

Concur will check if you are sure. If you click Delete to confirm your claim will be permanently deleted.

How to amend/correct a claim

If there are any errors or queries on your claim it may be returned to you for corrections.

You will receive an email notifying you that the claim has been rejected.

To view it and make corrections, either follow the link in the email or go into Concur and click Expense at the top, then select the claim that was returned.
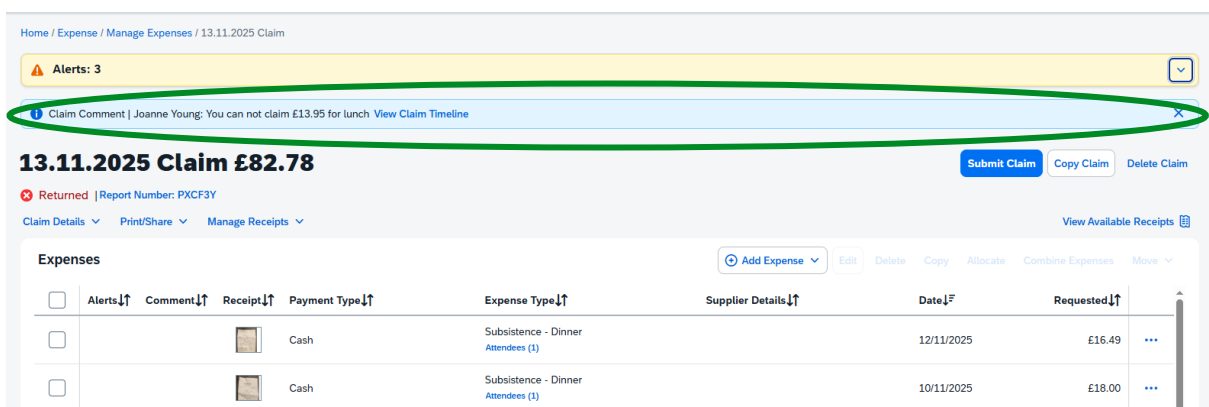
The claim will show that it has been returned, and has a comment from the rejector.

From here you can view the comment, then click each expense line that needs amending, make any changes needed and add a comment where required. Click Save Expense whenever you make a change.

Once all changes are completed you should click Submit Claim, and this will restart the submission process.

How to duplicate a claim

If you have experienced an error with your claim and need to resubmit it as a fresh claim, or you often claim the same thing and wish to save time by copying a claim and updating it, you can do so by clicking the Copy Claim button on the top right.
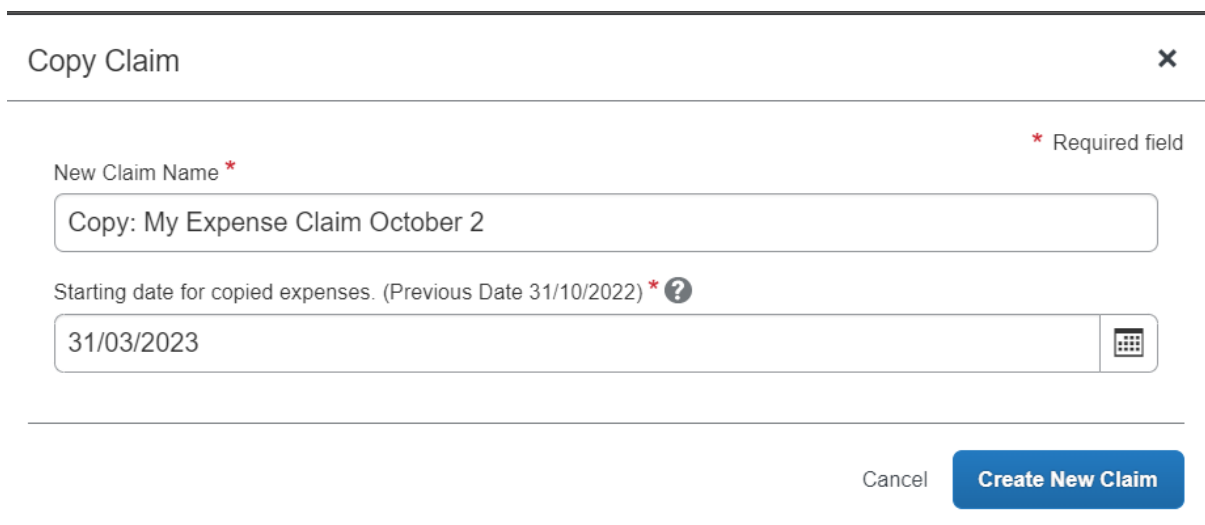

You will be given the option to rename the claim and change the date:

All text will be copied across, but receipt images are not and will have to be attached.
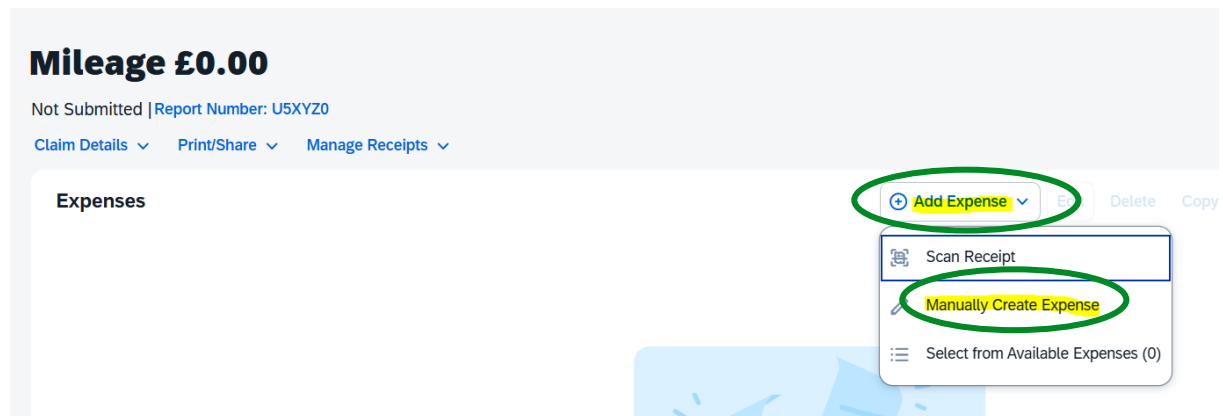
How to claim mileage

Before you can claim mileage, you must first set up your vehicle on Concur. **See page 4.**

How to claim a mileage expense

Choose your Expense Type

Add a new expense to your claim:

Mileage £0.00

Not Submitted | Report Number: U5XYZ0

Claim Details ∨   Print/Share ∨   Manage Receipts ∨

Expenses   ⊕ **Add Expense** ∨   Delete   Copy

         ▦ Scan Receipt

         ✎ Manually Create Expense

         ☰ Select from Available Expenses (0)

You can type into the search box or scroll down to 02. Transportation to find mileage

Add Expense to Claim

▦ Scan Receipt   ✎ **Manually Create Expense**   ☰ Select from Available Expenses (0)

Select an expense type for the new expense

[Search   🔍]

Search by expense type, category, description

⌃ **Recently Used**

     Hotel London

     Bus

     Cars with an allowance - mileage

     Tolls/Congestion Charges

     Underground Rail/Tube Travel

⌃ **01. Travel**

     Hotel London

Concur covers mileage for:

- **Cars without an allowance** – choose this expense type if you do not receive car allowance
- **Private Motorcycle Mileage**
- **Bicycles** – these are under 'car without an allowance' – you will need to set up a 'vehicle' and choose bicycle as the type

Enter the journey start and end

Enter the postcodes for the beginning and end of your journey then click 'Calculate Route':

If your journey was a return journey, simply click 'Make Round Trip':

When that journey is complete, check the automatically calculated route looks accurate, then click 'Add Mileage to Expense',

Notable fields

Transaction Date: The date of your journey

Business Purpose: The Business Purpose field in Concur is a mandatory field. This should be a clear explanation of why this expense was incurred - It always needs to include enough information so the approver and the tax auditor is able to confirm that the claim is in accordance with Macmillan's Expense Policy and the HMRC regulations. Be as specific and accurate as you can.

Receipt Status: Mileage claims do not need a receipt, so leave this as 'No Receipt'

Project: This is where you can choose a budget code outside of your default one to allocate an expense to.

Vehicle ID: Ensure you choose the right car in the Vehicle ID – this will default to your Preferred one in your car setup.

Number of Passengers: The business passenger must also be an employee or volunteer. It is not available for motorcycle or cycle users.

Amount: This is automatically calculated using the mileage rate and the journey you have entered.

Comment: You can put additional information here if required to explain the business purpose.

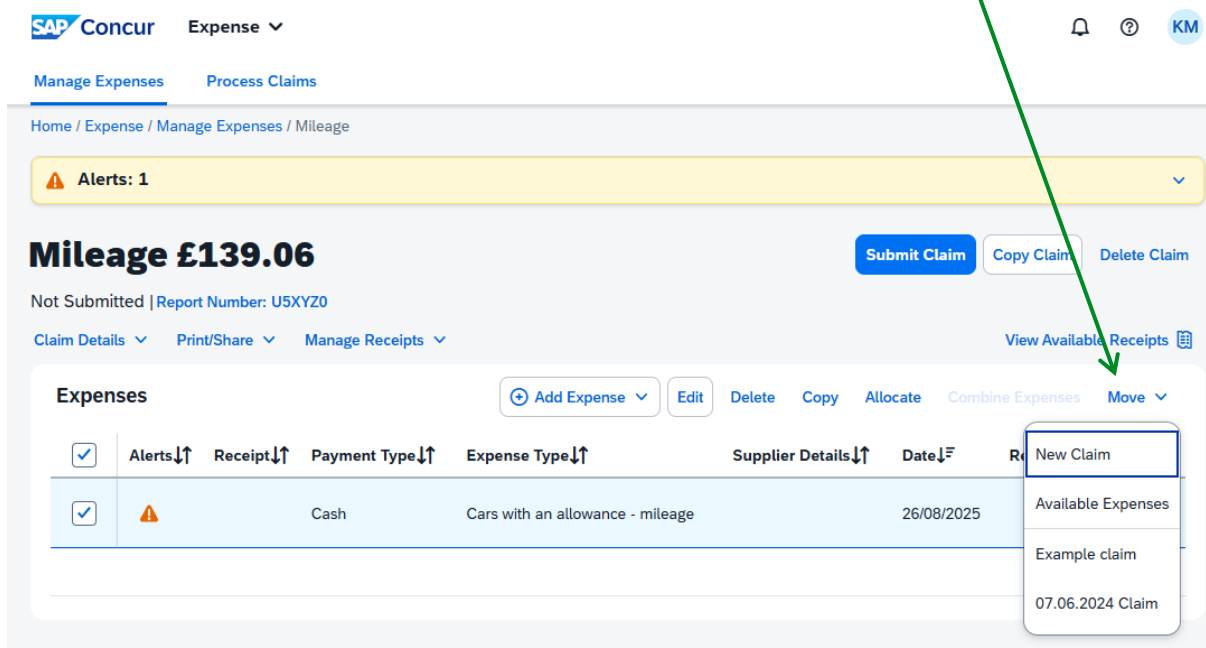Save Expense   Save and Add Another   Cancel

Click Save or Save and add another if you have more expenses to input.

How to Merge Expense Claims

To merge all your expense claims into one claim so that we don't get charged for each claim, all you need to do is create a new Claim with an appropriate name, e.g. Q1 Expenses.

Then go into each one of your claims, tick the box that is to the left hand side just under Expenses so it selects all the expenses within that claim, then select 'Move' and select the claim you wish to move them all to.

This will move all the expenses within that claim to the new claim. Do this for each expense claim you wish to merge, then submit it.

Once submitted you should then delete all your previous claims that should now all be showing £0.00 and be empty.

Splitting out expense lines

If you have one expense item under query, you can also use this method to remove it from a claim and get the rest processed while you resolve the issue with that one line.

How can I track the status of my expense claim?

Once you have submitted an expense claim it goes through several stages of review/approvals before it is paid.
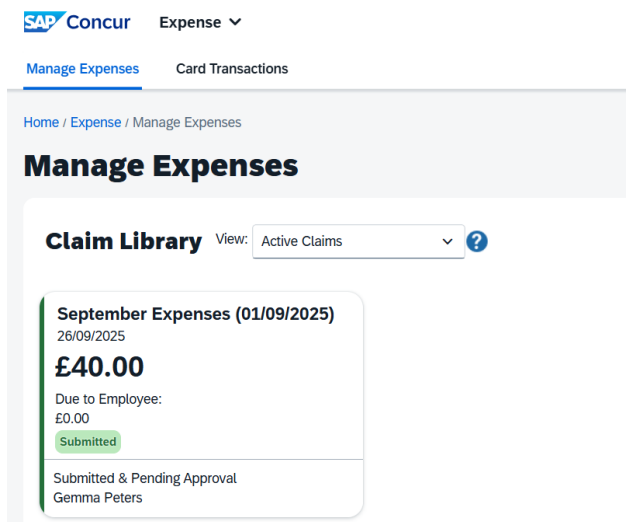
Navigate to your claim

After logging into Concur, the Home screen will look as below:
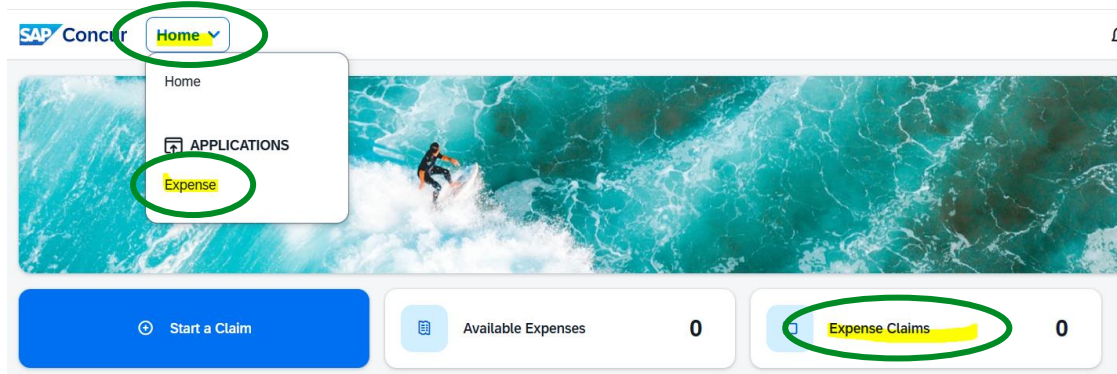
Either click Expense Claims, or click Home/Expense. This screen will show you all your unpaid expense claims.

A Submitted claim as below is with an approver.

Approval steps

Pending Concur Audit Service – your claim is with Concur audit, who check that your claims match their receipts dates and amounts, and that receipts are clear and itemised.

Submitted & Pending Approval – your claim is with your manager. Their name will be visible on this step.

Approved & In Accounting Review – your claim is with the Expenditure team to check against the Macmillan Expenses Policy.

Rejections

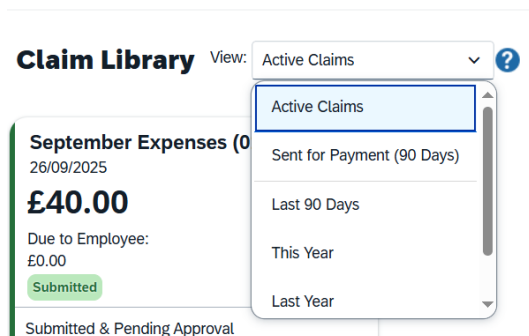A rejected claim will show in red and show the name of the person who rejected on it.
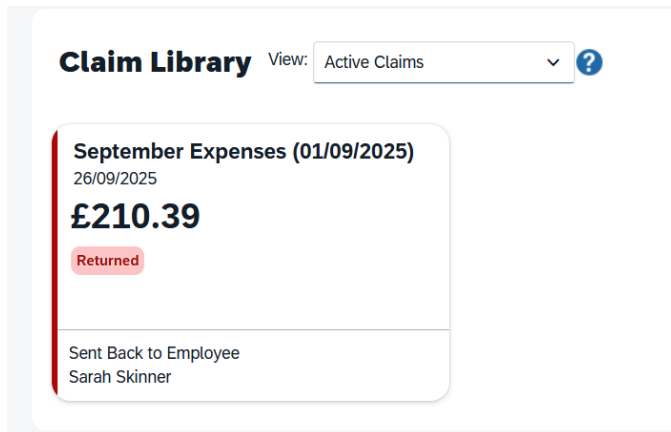
Click into the claim to see the comments on why this was rejected.

See the expense claim guidance on how to delete, amend or correct a claim.

Viewing paid claims

If you wish to browse paid claims click on the dropdown menu 'Claim Library' to view older claims:

Where to get support

If you have any queries about how to claim, how much you can claim, or what you can claim, you should first go to your Volunteer Manager, or main point of contact at Macmillan.

If you don't know who this is, you can get in touch with VolunteerEnquiries@macmillan.org.uk and we can point you in the right direction.