Last Updated: 1/10/2025

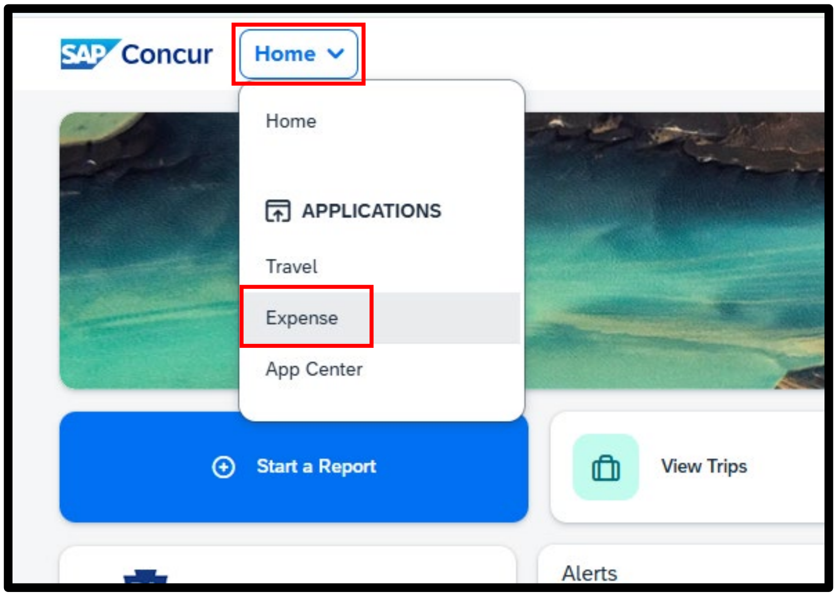
User Guide – Reopening an Expense Report (Adjustment Request) – Reports created on or after January 1, 2025

This guide is intended to walk an employee through reopening an approved expense report to make adjustments, such as adding additional expenses or making changes to existing expenses.

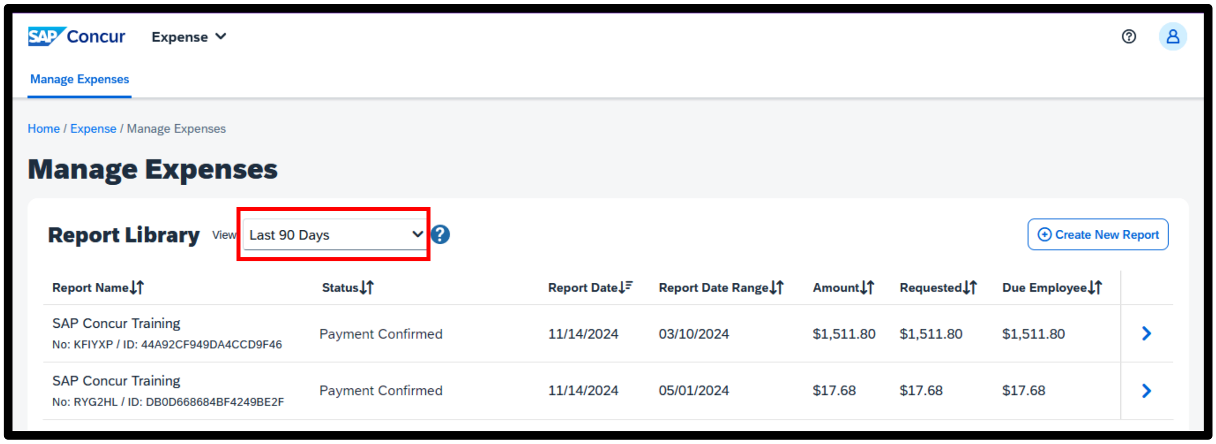
Expense reports created on or after January 1, 2025, can be reopened if these criteria are met:

- Status is "Payment Confirmed" (paid by Treasury).
- Less than 90 days have elapsed since the last successful posting in SAP.
- Traveler is in an active status.
- Traveler has not changed agencies.
- A cash advance was not applied to the expense report.

1. Use the following steps to locate the expense report to reopen.
   a. Navigate to Expense by clicking the **Home** dropdown in the top menu bar and selecting **Expense** under the Applications submenu.


SAP Concur
Home
Home
APPLICATIONS
Travel
Expense
App Center
Start a Report
View Trips
Alerts

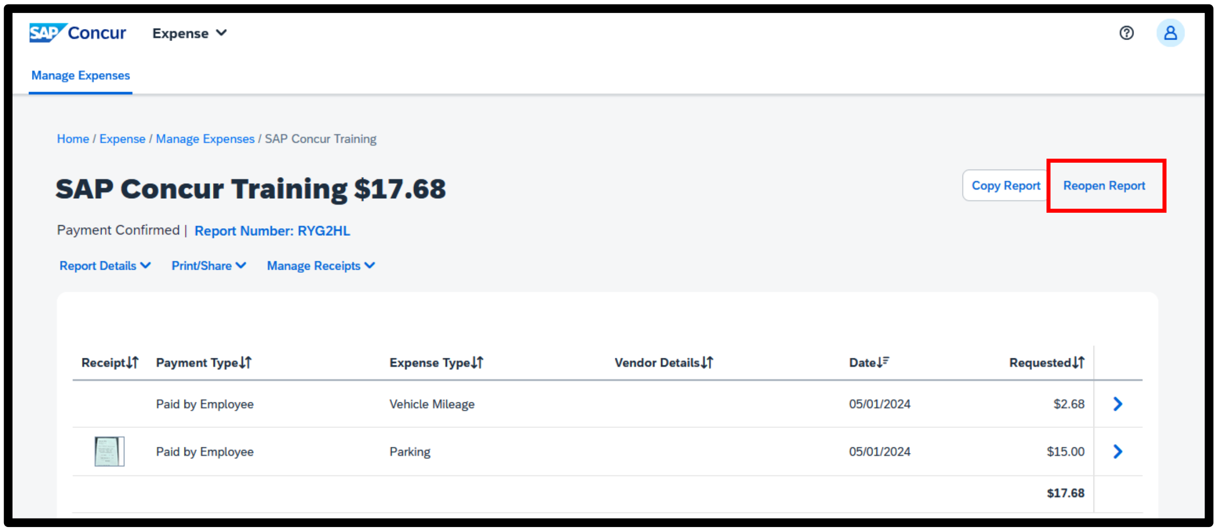
b. Click the **View** dropdown in the Report Library section and select the applicable timeframe to display approved reports.


SAP Concur
Expense
Manage Expenses
Home / Expense / Manage Expenses
Manage Expenses
Report Library
View
Last 90 Days
Create New Report

Report Name	Status	Report Date	Report Date Range	Amount	Requested	Due Employee
SAP Concur Training No: KFIYXP / ID: 44A92CF949DA4CCD9F46	Payment Confirmed	11/14/2024	03/10/2024	$1,511.80	$1,511.80	$1,511.80
SAP Concur Training No: RYG2HL / ID: DB0D668684BF4249BE2F	Payment Confirmed	11/14/2024	05/01/2024	$17.68	$17.68	$17.68

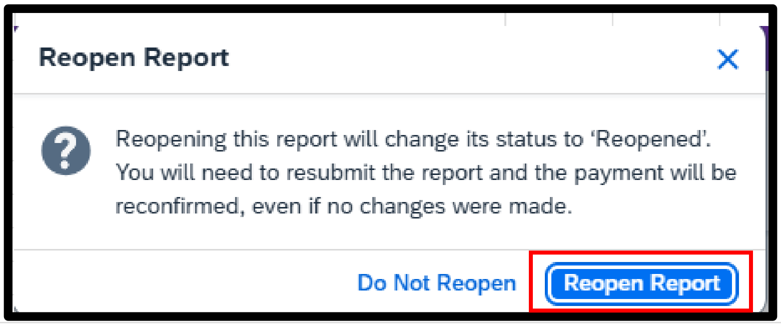
c. Select the expense report you want to reopen.

2. The **Reopen Report** option will be displayed. If this option is not displayed, the report does not meet the criteria listed above and cannot be reopened. A new expense report needs to be created for the adjustment. [Reference: SAP Concur User Guide – Creating an Adjustment Request – Reports created prior to January 1, 2025]


SAP Concur
Expense
Manage Expenses
Home / Expense / Manage Expenses / SAP Concur Training
SAP Concur Training $17.68
Copy Report
Reopen Report
Payment Confirmed | Report Number: RYG2HL
Report Details
Print/Share
Manage Receipts

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
	Paid by Employee	Vehicle Mileage		05/01/2024	$2.68
	Paid by Employee	Parking		05/01/2024	$15.00
					$17.68

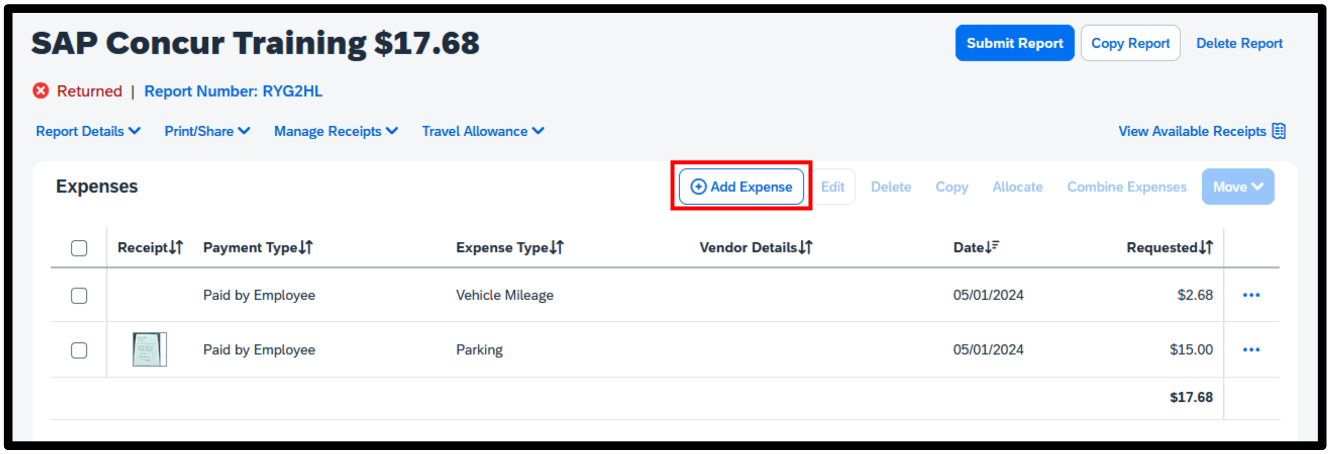
3. Click **Reopen Report**. The following message will display reminding you that once reopened, the report will need to be resubmitted even if no changes are made. Select **Reopen Report** to continue.


Reopen Report
Do Not Reopen
Reopen Report

Reopening this report will change its status to 'Reopened'. You will need to resubmit the report and the payment will be reconfirmed, even if no changes were made.

Adding Expenses

1. To add an expense to the report, click the **+ Add Expense** button.

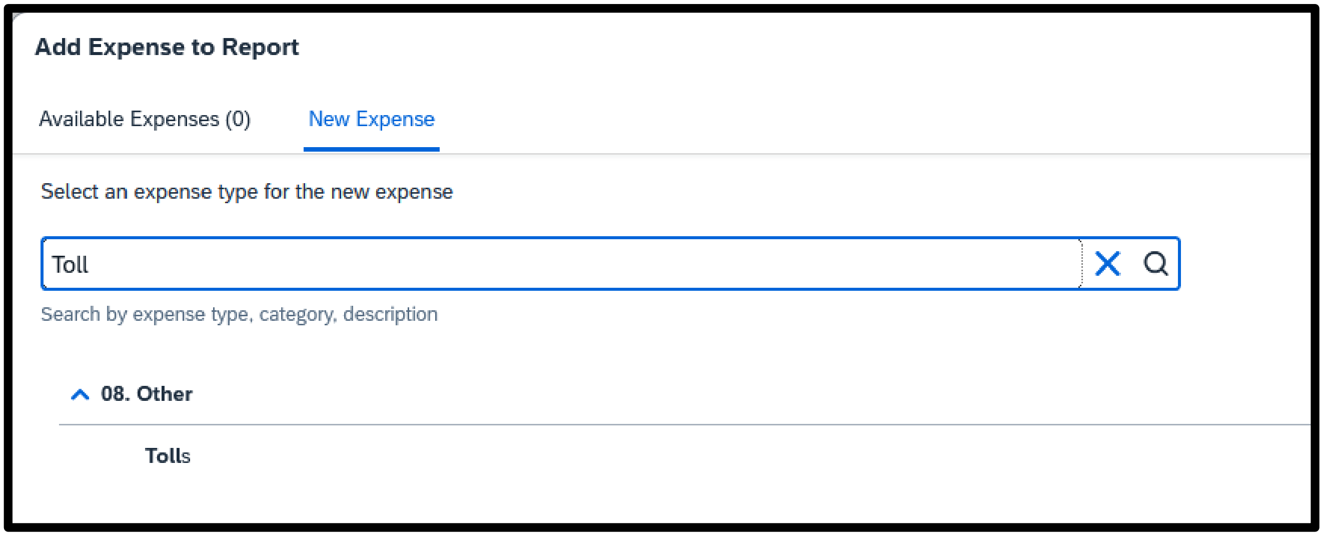

Submit Report
Copy Report
Delete Report
Report Details
Print/Share
Manage Receipts
Travel Allowance
View Available Receipts
Expenses
Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move

SAP Concur Training $17.68

Returned | Report Number: RYG2HL

☐	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
☐		Paid by Employee	Vehicle Mileage		05/01/2024	$2.68	•••
☐		Paid by Employee	Parking		05/01/2024	$15.00	•••
						$17.68	

2. The **Add Expense to Report** window will be displayed with the New Expense tab selected. Select an expense from the list of available expense types or type the expense type name in the search field. In this example, we will be adding a toll expense to the report.

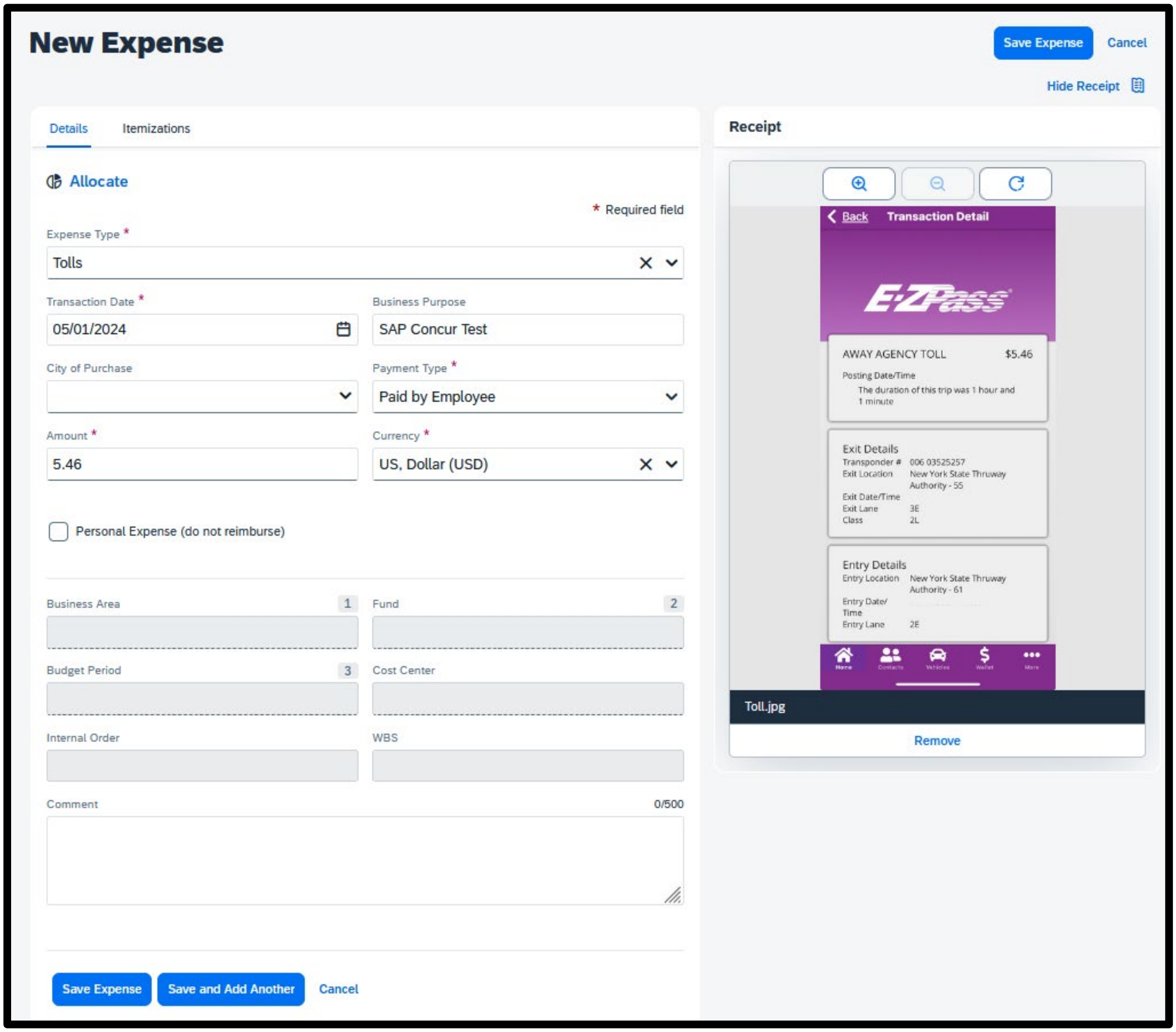

Add Expense to Report
Available Expenses (0)
New Expense
Select an expense type for the new expense
Search by expense type, category, description
08. Other
Tolls

Toll

3. Complete the required fields and any optional fields as needed.

4. Click in the Add Receipt window to attach a receipt. Note: Receipt images must be of an acceptable file type (.pdf, .png, .jpg, .jpeg, .tif, or .tiff) and must be less than 5 megabytes (MB) in size.

5. When complete, you again have the option to click the **Save Expense** button or the **Save and Add Another** button to continue entering expenses. In this example, we are finished entering expenses. Click the **Save Expense** button.


Save Expense
Cancel
Hide Receipt
Details
Itemizations
Allocate
Receipt
Back
Transaction Detail
Home
Contacts
Vehicles
Wallet
More
Remove
Save Expense
Save and Add Another
Cancel

New Expense

* Required field

Expense Type *: Tolls

Transaction Date *: 05/01/2024

Business Purpose: SAP Concur Test

City of Purchase:

Payment Type *: Paid by Employee

Amount *: 5.46

Currency *: US, Dollar (USD)

☐ Personal Expense (do not reimburse)

Business Area 1

Fund 2

Budget Period 3

Cost Center

Internal Order

WBS

Comment 0/500

AWAY AGENCY TOLL $5.46

Posting Date/Time

The duration of this trip was 1 hour and 1 minute

Exit Details

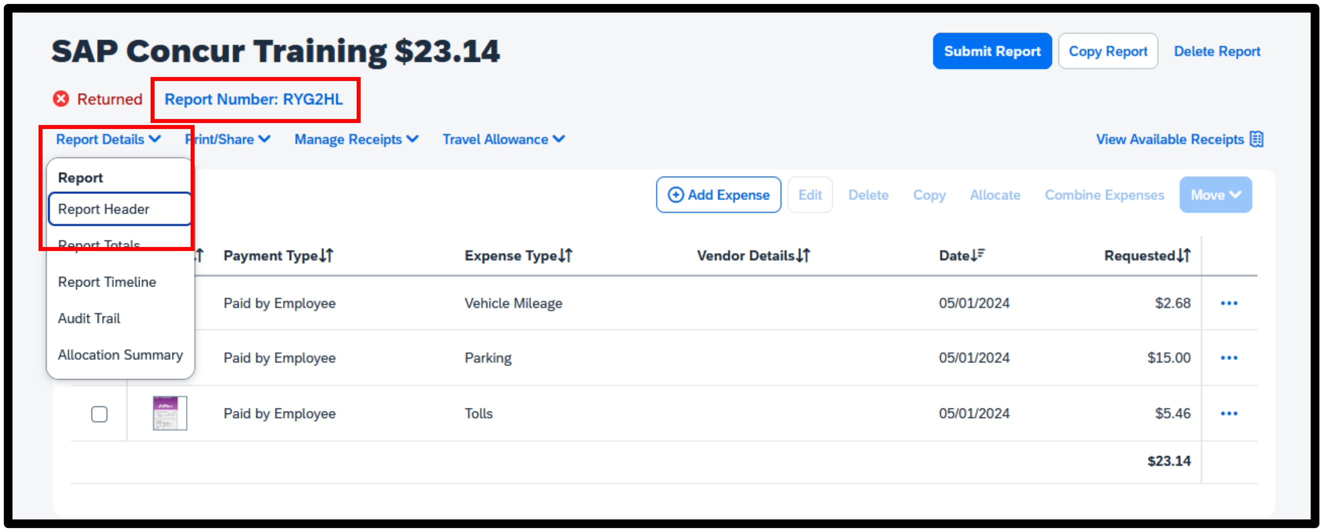
Transponder #	006 03525257
Exit Location	New York State Thruway Authority - 55
Exit Date/Time	
Exit Lane	3E
Class	2L

Entry Details

Entry Location	New York State Thruway Authority - 61
Entry Date/ Time	
Entry Lane	2E

Toll.jpg

6. To submit a reopened report, a comment is required on the Report Header page. To open the Report Header page, click the **Report Details** drop-down and select **Report Header** or click the **Report Number** link.

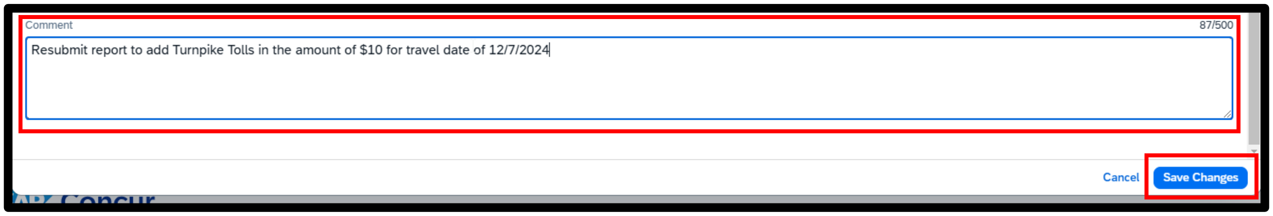

Submit Report
Copy Report
Delete Report
Report Details
Print/Share
Manage Receipts
Travel Allowance
View Available Receipts
Report
Report Header
Report Totals
Report Timeline
Audit Trail
Allocation Summary
Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move

SAP Concur Training $23.14

Returned Report Number: RYG2HL

Payment Type	Expense Type	Vendor Details	Date	Requested
Paid by Employee	Vehicle Mileage		05/01/2024	$2.68
Paid by Employee	Parking		05/01/2024	$15.00
Paid by Employee	Tolls		05/01/2024	$5.46
				$23.14

7. On the Report Header page, scroll down to the **Comment** field and enter an explanation for the changes you are making to the report. Click **Save Changes**.

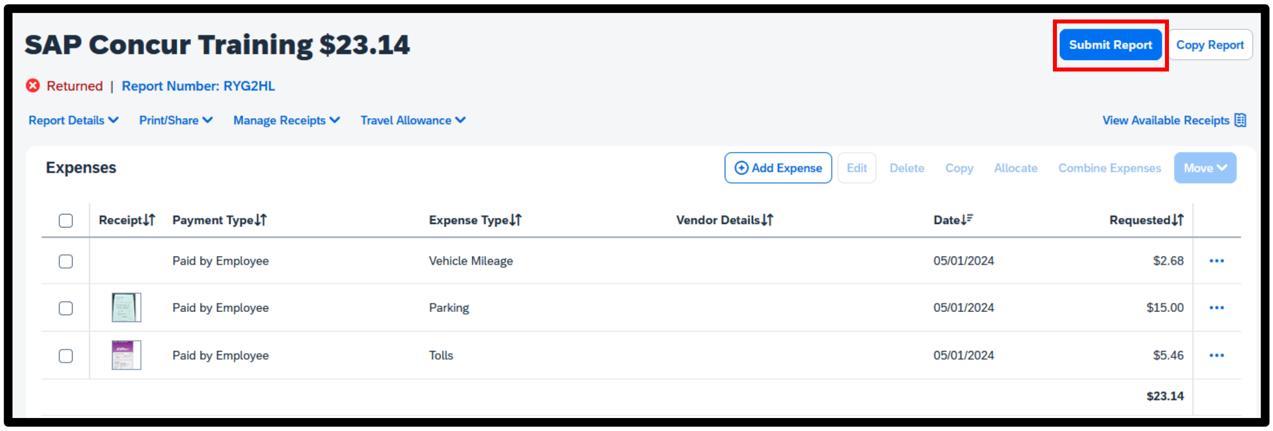


Comment 87/500

Resubmit report to add Turnpike Tolls in the amount of $10 for travel date of 12/7/2024

Cancel
Save Changes

8. When finished entering expenses and attaching receipt images, click the **Submit Report** button.



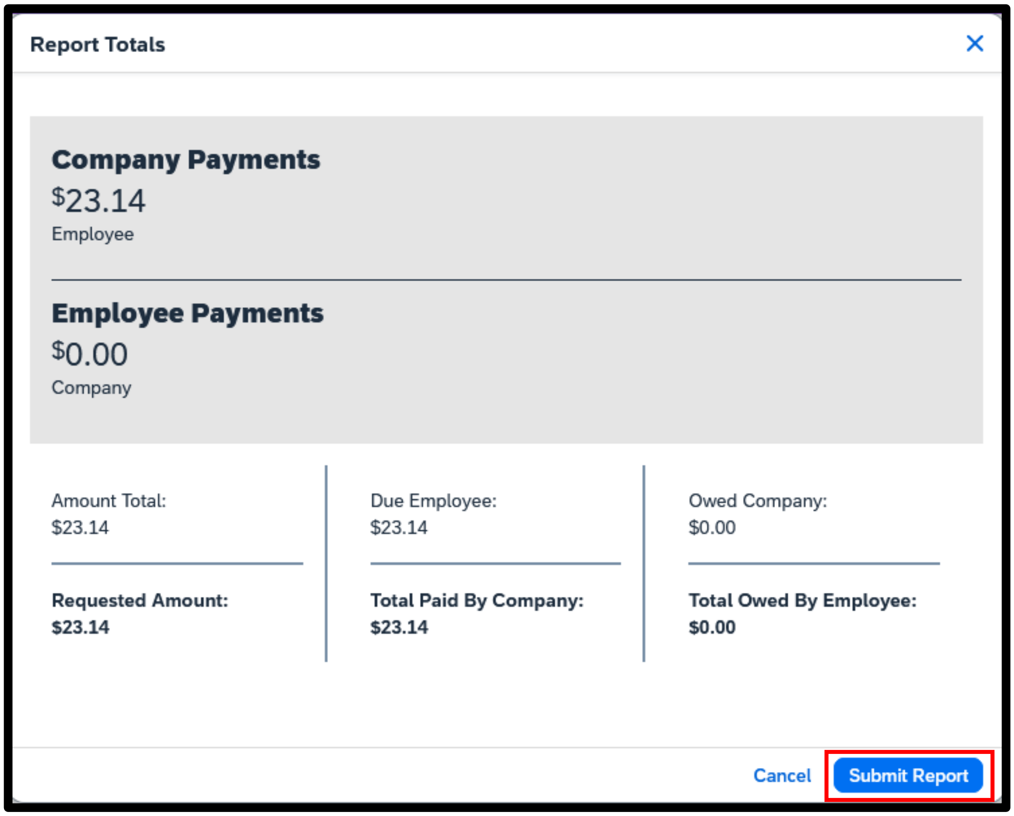
SAP Concur Training $23.14

Returned | Report Number: RYG2HL

Submit Report
Copy Report
Report Details
Print/Share
Manage Receipts
Travel Allowance
View Available Receipts
Expenses
Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move

☐	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐		Paid by Employee	Vehicle Mileage		05/01/2024	$2.68
☐		Paid by Employee	Parking		05/01/2024	$15.00
☐		Paid by Employee	Tolls		05/01/2024	$5.46
						$23.14

9. The Report Totals page will display the total of all expenses in the report; however, you will only be paid for the expenses you added to the report. Click the **Submit Report** button to send the report to the designated travel approver.



Report Totals

Company Payments
$23.14
Employee

Employee Payments
$0.00
Company

Amount Total: $23.14

Due Employee: $23.14

Owed Company: $0.00

Requested Amount: $23.14

Total Paid By Company: $23.14

Total Owed By Employee: $0.00

Cancel
Submit Report

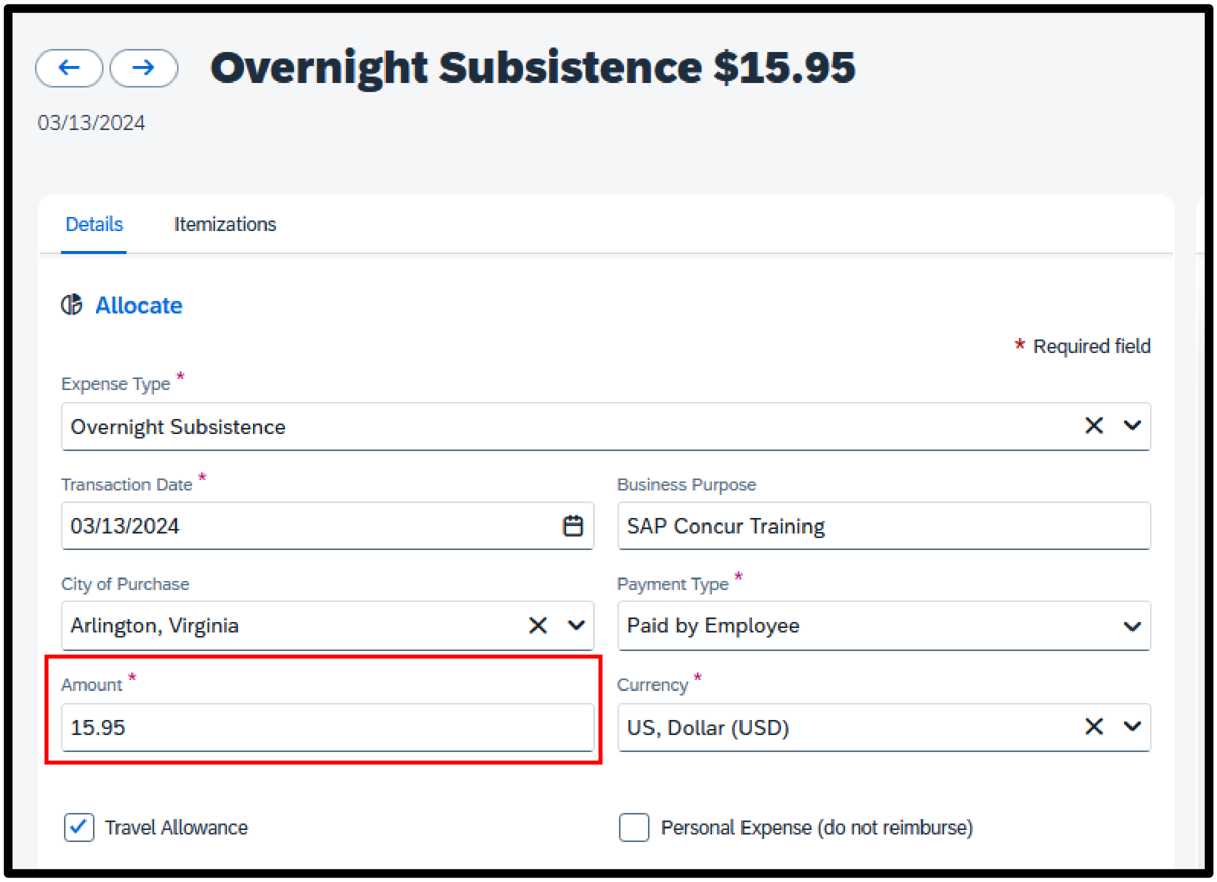
Changing Expenses

When an expense report is reopened, you can change but not delete existing expenses within the report if you were not reimbursed correctly. Only reopen a report when you are owed reimbursement for travel expenses not previously received. If you discover you were overpaid for travel expenses, please contact the Travel Help Desk at RA-OB-CO-TRAVELAUDITS@pa.gov for guidance.

The following scenarios illustrate when and how to change existing expenses:

1. **Expense Amount:** the amount of an expense may be changed when the original amount was incorrect.

   To correct an expense amount, open the expense and change the amount to the correct value. Click the **Save Expense** button. The receipt attached to the expense must reflect the amount you are claiming.



Overnight Subsistence $15.95

03/13/2024

Expense Type *: Overnight Subsistence

Transaction Date *: 03/13/2024

Business Purpose: SAP Concur Training

City of Purchase: Arlington, Virginia

Payment Type *: Paid by Employee

Amount *: 15.95

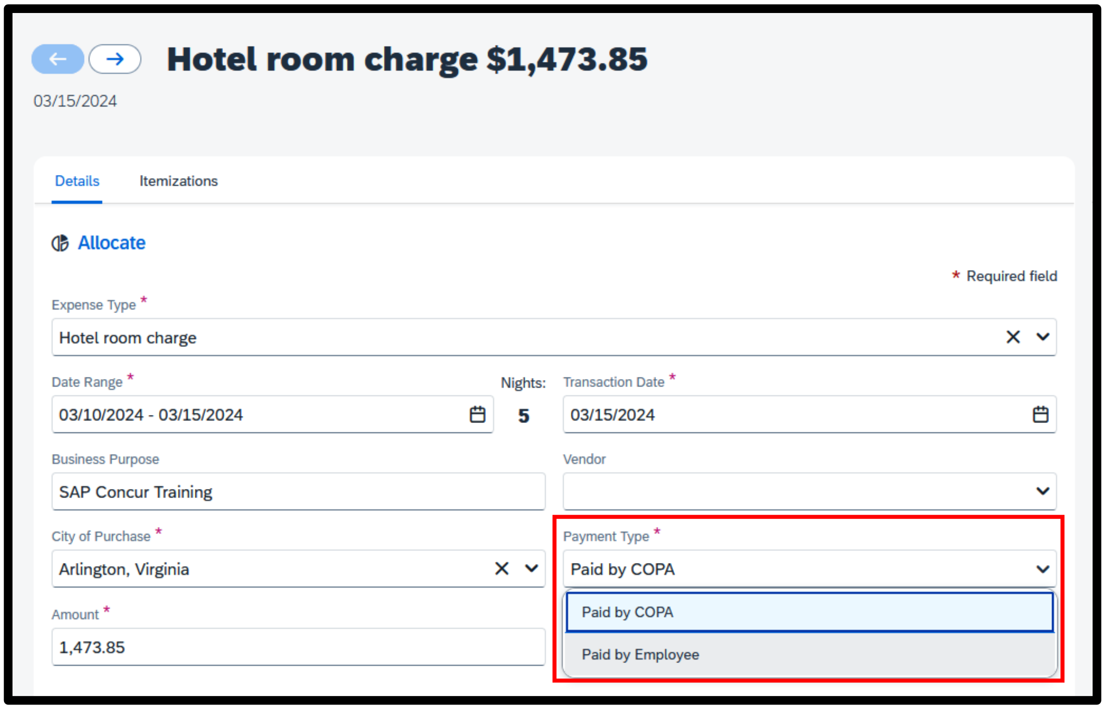
Currency *: US, Dollar (USD)

☑ Travel Allowance

☐ Personal Expense (do not reimburse)

2. **Payment Type:** the Payment Type of an expense may be changed. For example, "Paid by COPA" may have been selected as the Payment Type for a hotel expense which caused you to not be reimbursed for the expense, but you paid for the hotel with your corporate travel card or a personal card.

   To be reimbursed for the hotel expense, open the Hotel room charge expense, change the Payment Type to "Paid by Employee", and click the **Save Expense** button.



Hotel room charge $1,473.85

03/15/2024

Details | Itemizations

Allocate

* Required field

Expense Type *: Hotel room charge

Date Range *: 03/10/2024 - 03/15/2024

Nights: 5

Transaction Date *: 03/15/2024

Business Purpose: SAP Concur Training

Vendor:

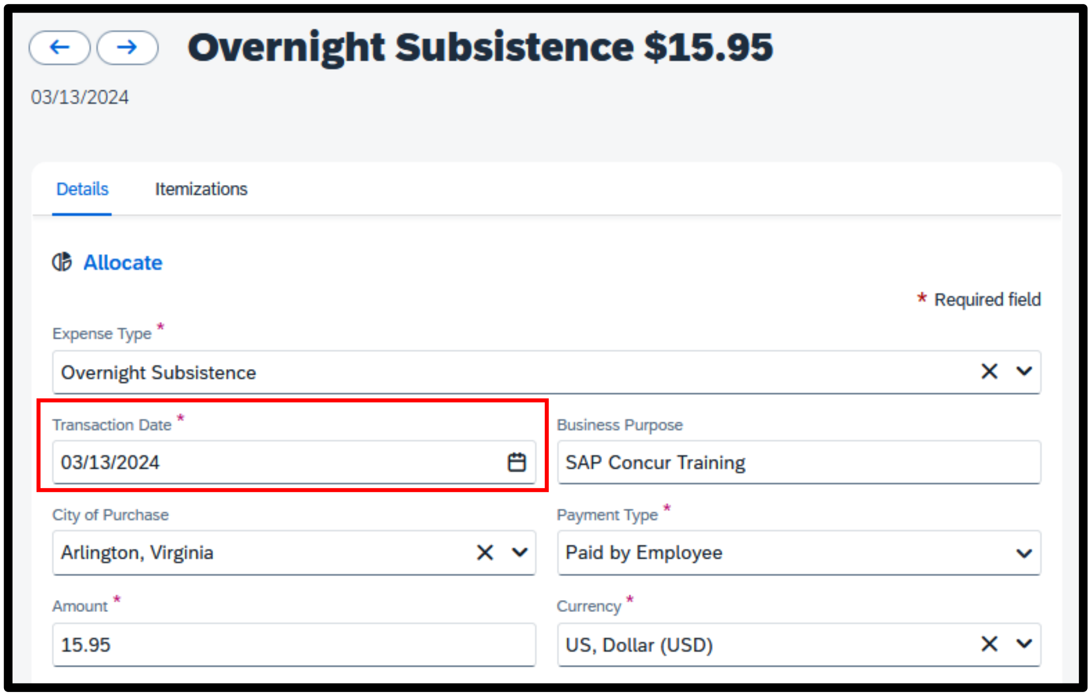
City of Purchase *: Arlington, Virginia

Payment Type *: Paid by COPA

Amount *: 1,473.85

3. **Transaction Date:** the transaction date may be changed when an incorrect date was entered and affected the reimbursement amount. Overnight Subsistence is the only expense type that may be affected by an incorrect transaction date.

   To correct a transaction date, open the expense and change the transaction date to the correct date. Click the Save Expense button.



Overnight Subsistence $15.95

03/13/2024

Details | Itemizations

Allocate

* Required field

Expense Type *: Overnight Subsistence

Transaction Date *: 03/13/2024

Business Purpose: SAP Concur Training

City of Purchase: Arlington, Virginia

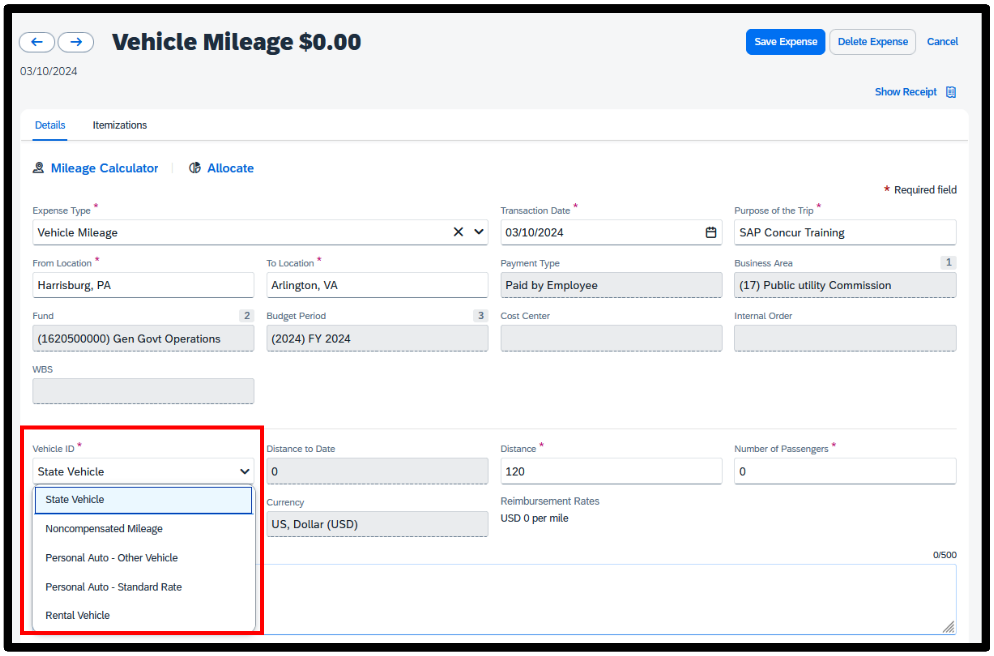
Payment Type *: Paid by Employee

Amount *: 15.95

Currency *: US, Dollar (USD)

4. **Vehicle ID:** the Vehicle ID on a Vehicle Mileage expense may be changed. For example, "Noncompensated Mileage" may have been selected as the Vehicle ID but you drove your personal vehicle and wish to be reimbursed for the mileage.

   To be reimbursed for the mileage, open the Vehicle Mileage expense, click the Vehicle ID dropdown and select the appropriate Vehicle ID for the mileage entry. Click the **Save Expense** button.



Vehicle Mileage $0.00

03/10/2024

Save Expense
Delete Expense
Cancel
Show Receipt
Details
Itemizations
Mileage Calculator
Allocate
* Required field

Expense Type *: Vehicle Mileage

Transaction Date *: 03/10/2024

Purpose of the Trip *: SAP Concur Training

From Location *: Harrisburg, PA

To Location *: Arlington, VA

Payment Type: Paid by Employee

Business Area 1: (17) Public utility Commission

Fund 2: (1620500000) Gen Govt Operations

Budget Period 3: (2024) FY 2024

Cost Center:

Internal Order:

WBS:

Vehicle ID *: State Vehicle

- State Vehicle
- Noncompensated Mileage
- Personal Auto - Other Vehicle
- Personal Auto - Standard Rate
- Rental Vehicle

Distance to Date: 0

Distance *: 120

Number of Passengers *: 0

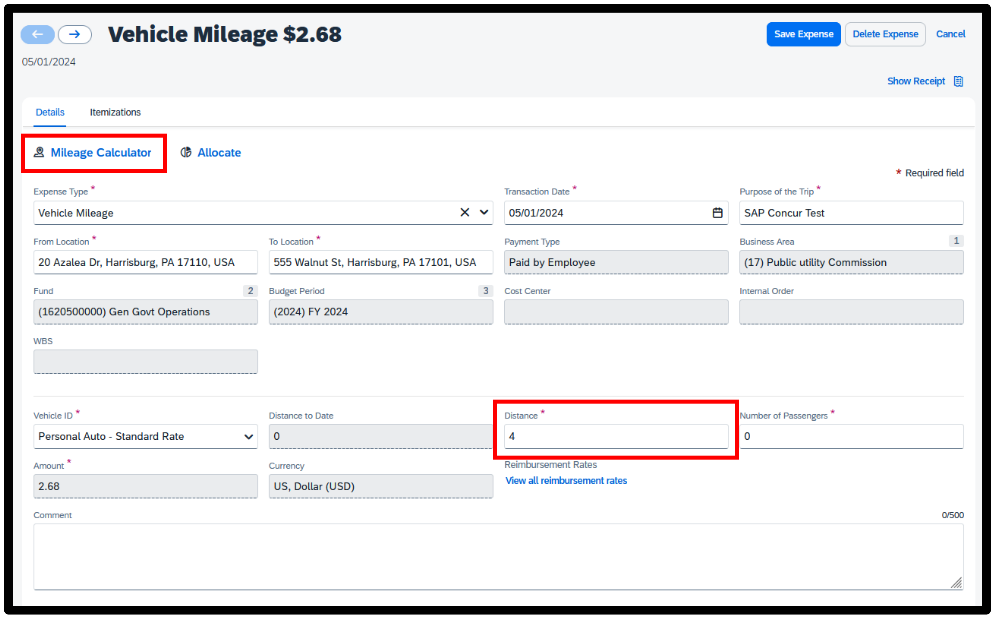
Currency: US, Dollar (USD)

Reimbursement Rates: USD 0 per mile

0/500

5. **Distance:** the Distance (mileage) field on a Vehicle Mileage expense may be changed when an incorrect number of miles was originally submitted.

   To correct the number of miles claimed, open the Vehicle Mileage expense and use the Mileage Calculator to update the number of miles or enter the correct number of miles in the Distance field. Click the **Save Expense** button.



Vehicle Mileage $2.68

05/01/2024

Save Expense
Delete Expense
Cancel
Show Receipt
Details
Itemizations
Mileage Calculator
Allocate
* Required field

Expense Type *: Vehicle Mileage

Transaction Date *: 05/01/2024

Purpose of the Trip *: SAP Concur Test

From Location *: 20 Azalea Dr, Harrisburg, PA 17110, USA

To Location *: 555 Walnut St, Harrisburg, PA 17101, USA

Payment Type: Paid by Employee

Business Area 1: (17) Public utility Commission

Fund 2: (1620500000) Gen Govt Operations

Budget Period 3: (2024) FY 2024

Cost Center:

Internal Order:

WBS:

Vehicle ID *: Personal Auto - Standard Rate

Distance to Date: 0

Distance *: 4

Number of Passengers *: 0

Amount *: 2.68

Currency: US, Dollar (USD)

Reimbursement Rates: View all reimbursement rates

Comment: 0/500