

**Participant & Candidate “How To” Guide:
Requesting expense reimbursement**

Includes Frequently Asked Questions!

Click [here](#) for the Participant & Candidate Travel and Expense Policy

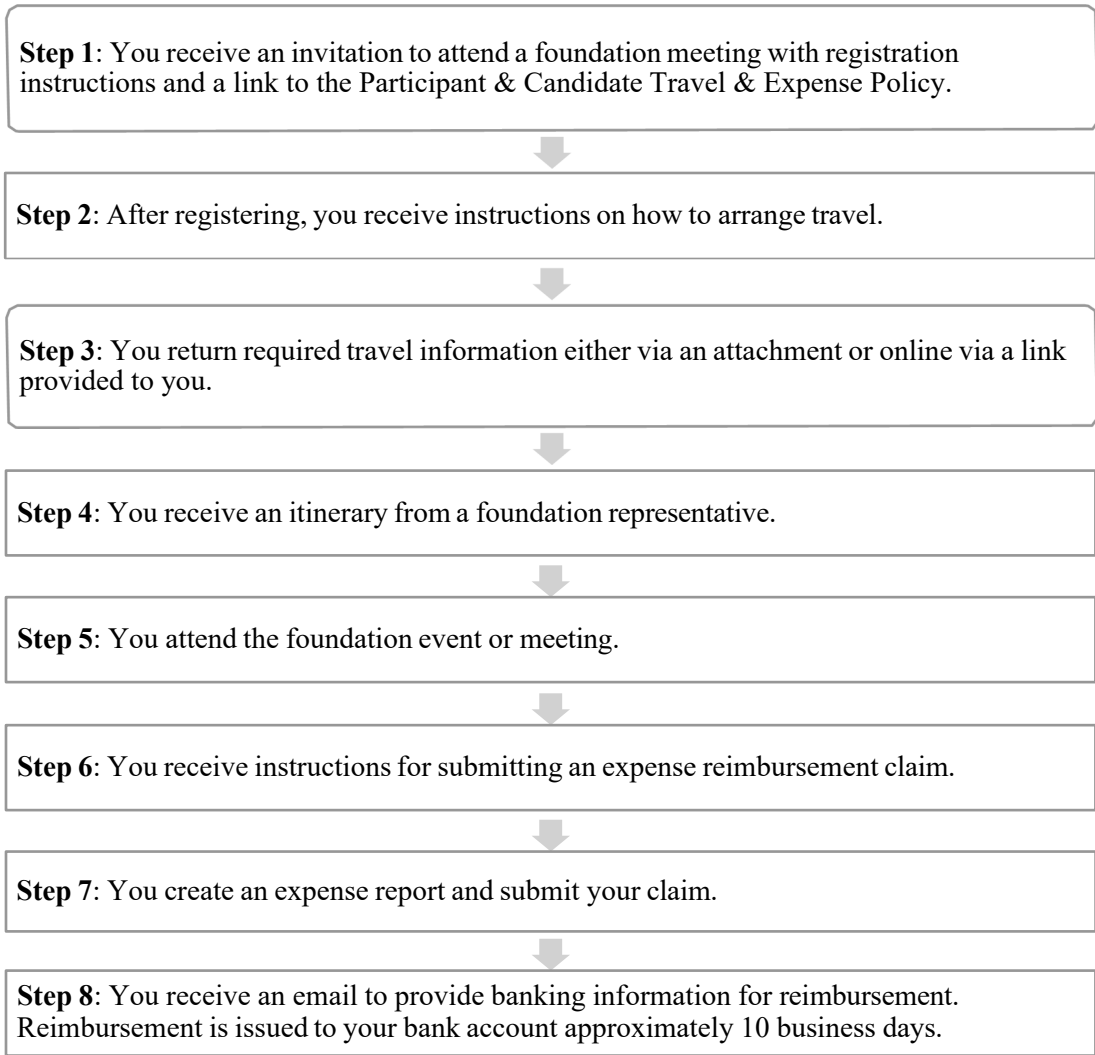
Instructions for creating and submitting a claim

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Reimbursement Process Summary



Foundation Contact Information

Travel Support	Gatesfoundation.us@contactcwt.com
Events Support	Events@gatesfoundation.org
Expense Claim Support	Expense@gatesfoundation.org

Reimbursement Policy Summary (See full policy for details)

Our objective is to provide our participants and candidates with logistical and financial support that enables us to work together and further the mission of the foundation.

As a participant or candidate, you are responsible for understanding this policy before incurring expenses. Expenses not expressly covered in this policy are not eligible for reimbursement.

- General Info**
- For expenses of USD75 or more, a corresponding receipt is required. *See full policy for events sponsored by foundation offices outside of the U.S.*
 - Reimbursement requests are submitted via the Concur online tool.
 - Candex issues reimbursement payment via electronic funds transfers direct to your bank account.
 - Reimbursement requests must be received within 60 days of the foundation event.
 - We only reimburse participants themselves, not the organization for which they work, since participants attend foundation events and incur out-of-pocket expenses as individuals.

TYPE OF EXPENSE	POLICY HIGHLIGHTS	POLICY PAGE REFERENCED
Air Transportation	<ul style="list-style-type: none"> • You must contact the foundation travel department prior to all foundation air travel. • Airfare will be booked and paid for through the foundation travel department unless expressly directed by a foundation representative to do otherwise. If booking your own travel, you will need a pre-trip quote from the foundation travel department before doing so. 	1
Combining Foundation & Non-Foundation Travel	<ul style="list-style-type: none"> • In order for your foundation travel-related expenses to be eligible for reimbursement, you'll need to contact the foundation travel department, in advance of travel, for a pre-trip quote. 	1
Lodging	<ul style="list-style-type: none"> • Lodging will be arranged and paid by the foundation, unless expressly directed to do otherwise by the foundation travel department. In such cases, the actual expense for lodging may be eligible for reimbursement within the guidelines of the policy and if submitted with proper receipts. Daily limits apply. • Except for internet charges and parking, incidental expenses incurred such as telephone, movies, mini bar, laundry, and other services are not eligible for reimbursement. 	2
Ground Transportation	<ul style="list-style-type: none"> • Taxis and other modes of public transportation are eligible for reimbursement provided they are not used in lieu of foundation provided transportation. • Airport parking is eligible for reimbursement for the duration of the foundation-sponsored event if submitted with required receipts. • Mileage for personal vehicles is reimbursable at the U.S. Internal Revenue Service (IRS) rate. 	2
Meals	<ul style="list-style-type: none"> • Expenses for meals are eligible for reimbursement provided they are not incurred in lieu of foundation-provided meals. In such cases, the actual expense for meals may be eligible for reimbursement within the guidelines of the policy and if submitted with receipts (required if USD75 or more). Daily limits apply. 	3
Travel-related Insurance, fees and Vaccines	<ul style="list-style-type: none"> • Standard fees paid for a passport, travel visa(s), and vaccines obtained specifically for a foundation-sponsored event may be eligible for reimbursement if within the guidelines of the policy and submitted with required receipts. • Fees from airlines that charge for the <i>first</i> checked bag are eligible for reimbursement. • When traveling to a foundation event more than 100 miles from their home country, participants and candidates are automatically insured for certain travel and medical circumstances under the foundation travel insurance policy. Additional insurance purchased by participants and candidates is not eligible for reimbursement. 	3

FAQs

The Bill and Melinda Gates Foundation is pleased to be sponsoring your visit. Please see the [PARTICIPANT & CANDIDATE TRAVEL AND EXPENSE POLICY](#) for important policy-related information.

Expense Reimbursement Policy

Here are some frequently asked questions about reimbursement policy:

Can I submit my expense claim at any time?

No, you must submit your expense claim within 60 calendar days of your participation in the foundation event. (If the event is multi-day, then it's 60 days from the last day of the event.)

Is there a maximum meal allowance?

Yes, there's a maximum daily meal amount. For details, refer to the policy link above.

Should I book my own travel?

No, unless instructed directly by the foundation travel department to book your own travel, you should work with the foundation's travel team to arrange the appropriate travel itinerary for you.

When do I need to provide a receipt and what if I don't have one?

Our policy requires receipts to be submitted for single expenses of USD75 or more. If one of your expenses exceeds this amount and you do not have a receipt, we unfortunately cannot reimburse you for that expense. See full policy linked above for complete description of receipt requirements for non-US office foundation sponsored events.

Expense Reimbursement Process

Here are some frequently asked questions about reimbursement process:

How long will it take for me to get reimbursed?

You can expect to receive your reimbursement in approximately 10 days after entering your bank information.

Can I check the status of my claim?

Yes, using your login name, you can log into Concur at any time. You can also adjust your automated alert preferences. Click on **profile settings**, then **expense preferences** on the left navigation.

Pre-Trip Quotes

If you are combining personal travel with your visit to a foundation event, you may book your own travel. In this instance, a pre-trip quote from the foundation travel department is required. You will be prompted to attach the quote when submitting your claim for reimbursement.

If the foundation has booked and paid for your air transportation, you do not need a pre-trip quote.

When and how should I get a pre-trip quote?

After you have registered for a foundation event and prior to arranging your travel, work with the foundation travel department to obtain a pre-trip quote.

What if I've already booked my airfare and I don't have a pre-trip quote?

Contact your foundation representative for next steps.

I have my pre-trip quote. What do I do with it?

When you enter this expense into the expense report, you will be prompted to attach the document to your expense report.

Submitting a Claim

What if I already have a Concur account? Can I use that same account?

No, you'll need to use the link and user name the foundation provides to you (firstlastguest@gatesfoundation.org). Any other existing Concur accounts will be unaffected.

How will I receive payment? Is it secure to enter my bank information?

You will receive payment direct to your bank account; it is the fastest and most secure method for issuing your payment. The third-party vendor, Concur, offers the highest level of internet security available.

Can I save my report and return to it, prior to submitting it?

Yes, you may save your work and come back to it.

I'd like to be reimbursed in a currency other than what's currently showing in my profile. How can I change it?

If you'd like to change your reimbursement currency, please contact expense@gatesfoundation.org. **Note:** *your reimbursement currency must align with the location of your bank account.*

I forgot one expense. Can I add it after I've submitted my report?

No, once you've submitted your report, it cannot be modified. Feel free to submit another report using the same login information.

If you still have questions or need additional help, contact: Expense@gatesfoundation.org

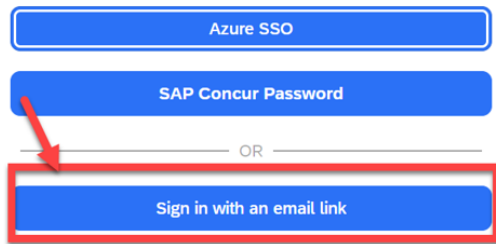
Getting started/Logging on

1. You will receive a welcome email from Expense@gatesfoundation.org with instructions on how to log into Concur.
2. Go to <https://www.concursolutions.com/> (Use only the web browser version of Concur.)
3. Use the login name provided in the welcome email, it will typically be your FirstnameLastnamequest@gatesfoundation.org. Note this appears to be an email address but no communication will be sent to this login.
4. Click Sign in with an email link

< Sign In

meghnaguest@gatesfoundation.org

Sign in with:



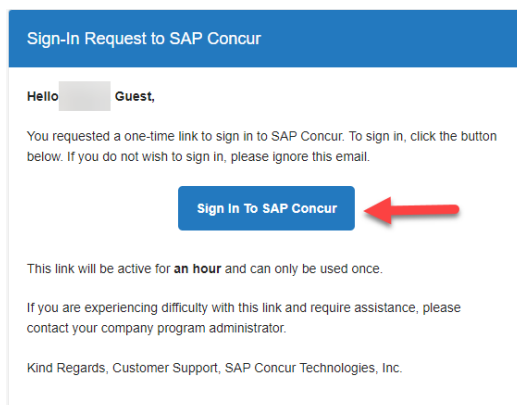
5. Check your email (the email address that your welcome email was sent to). You may need to check your spam/junk folders also.

Check your email

We have sent an email to you with a one-time link that will allow you to sign in instantly to your SAP Concur account. The link expires in an hour.

[Return to Sign In](#)

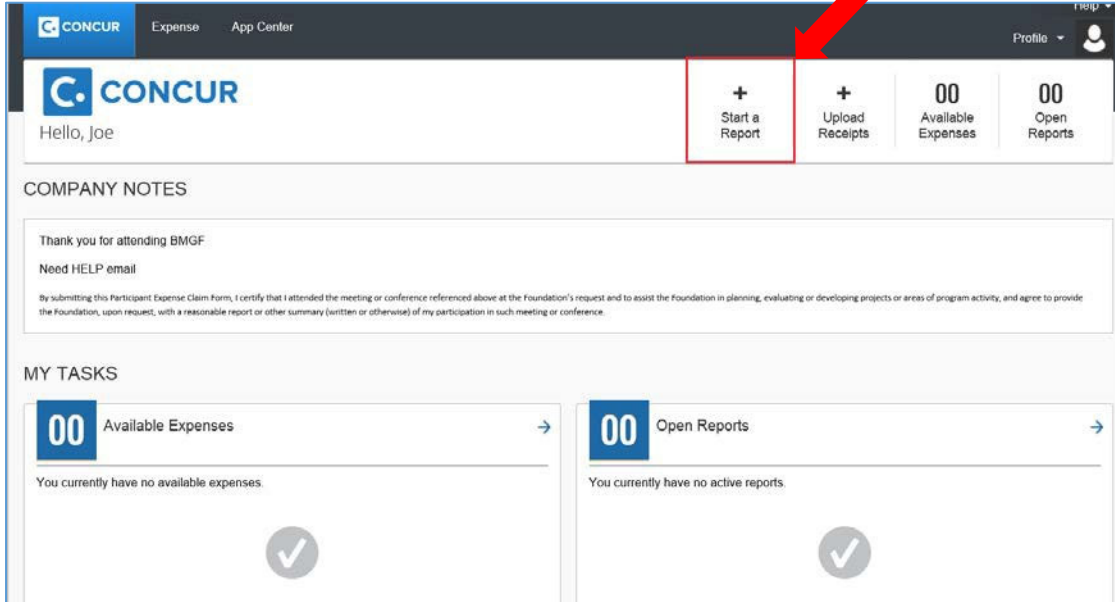
6. In the email, click on the Sign In To Concur



How to create and submit an expense report

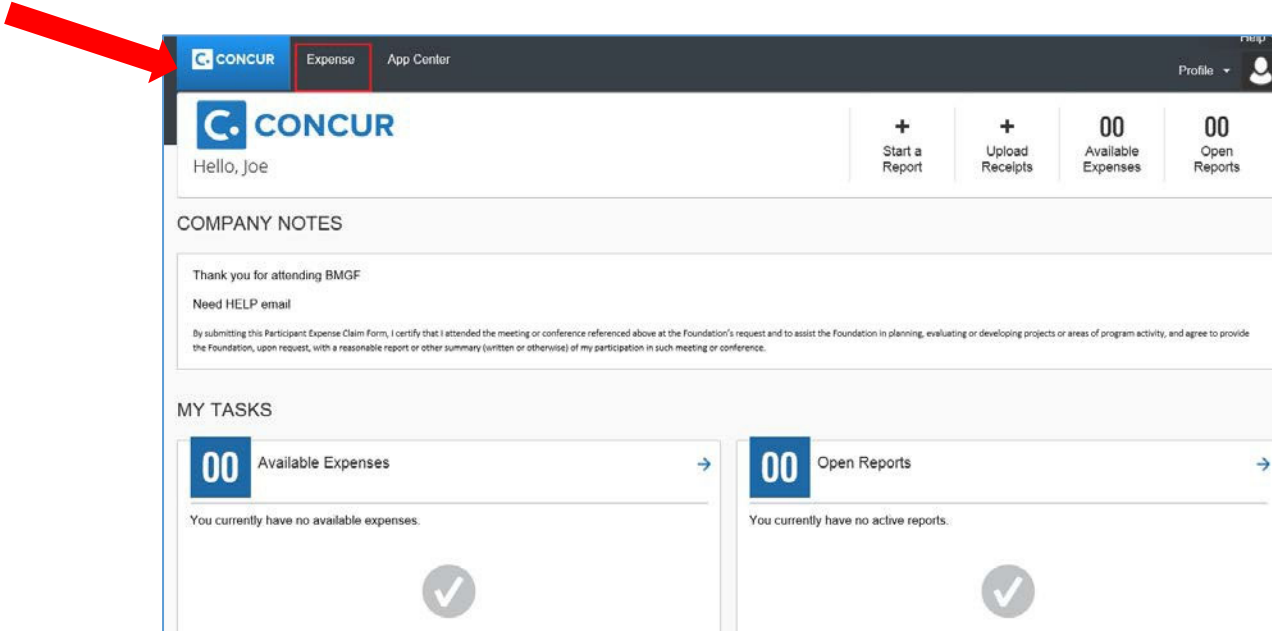
1. To start your report, you have two choices:

On the home page, click **+ Start a Report**.



– or –

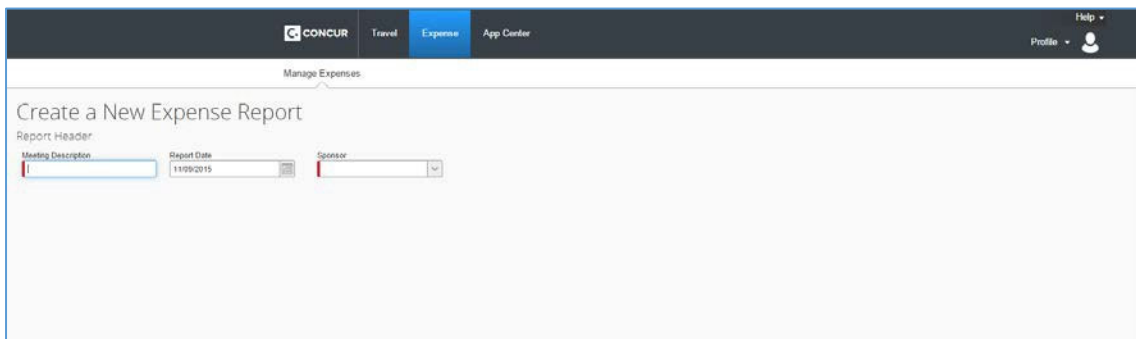
On the top menu, click Expense.



2. Click the **Create New Report** tile.



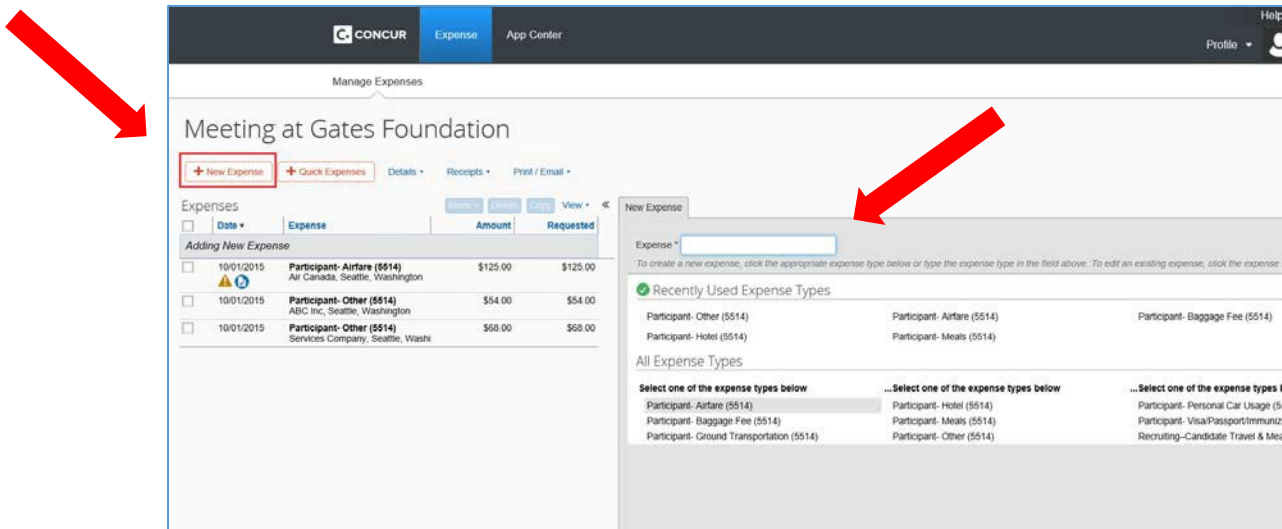
3. Enter a Meeting Description, your Sponsor's name (from the drop down selection) and click **Next**.



4. Click **+New Expense**

To add a new expense, click the appropriate expense type below **or** type the expense type in the field above.

To edit an existing expense, click the expense on the left side of the page.



The screenshot shows the 'Manage Expenses' interface. On the left, there is a table of existing expenses. On the right, there is a 'New Expense' form with an 'Expense' input field. A red arrow points to the '+ New Expense' button in the top left, and another red arrow points to the 'Expense' input field in the 'New Expense' form.

Date	Expense	Amount	Requested
10/01/2015	Participant-Airfare (5514) Air Canada, Seattle, Washington	\$125.00	\$125.00
10/01/2015	Participant-Other (5514) ABC Inc, Seattle, Washington	\$54.00	\$54.00
10/01/2015	Participant-Other (5514) Services Company, Seattle, Washi	\$68.00	\$68.00

New Expense

Expense =

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense

Recently Used Expense Types

Participant-Other (5514)	Participant-Airfare (5514)	Participant-Baggage Fee (5514)
Participant-Hotel (5514)	Participant-Meats (5514)	

All Expense Types

Select one of the expense types below	Select one of the expense types below	Select one of the expense types below
Participant-Airfare (5514)	Participant-Hotel (5514)	Participant-Personal Car Usage (5514)
Participant-Baggage Fee (5514)	Participant-Meats (5514)	Participant-Visa/Passport/Immuniz
Participant-Ground Transportation (5514)	Participant-Other (5514)	Recruiting-Candidate Travel & Me

- i. Make sure to complete all required fields (marked with red bars)
- ii. Click **Save**

US Schools conference

+ New Expense + Quick Expenses Details Recepts Print / Email

Expenses

Adding New Expense

Expense Type: Airfare (5514) Transaction Date: 10/02/2015 Business Purpose: Vendor: Southwest Airlines

Comment: City: Seattle, Washington

Amount: 125.00 USD Rate (GBP=1 USD): 0.66070000 Amount in GBP: 82.59

Tax Posted Amount: Passenger Name (if available): Ticket Number (if available):

TOTAL AMOUNT: £0.00 TOTAL REQUESTED: £0.00

Save Remove Attach R

- 5. You will be notified of any exception and required actions: e.g.: receipt or pre-trip quote required

US Schools conference

+ New Expense + Quick Expenses Details Recepts Print / Email

Exceptions

Expense	Date	Amount	Exception
Airfare (5514)	10/02/2015	USD 125.00	Please ensure you attach your pretrip quote

Expenses

Adding New Expense

Expense: Airfare (5514)

Recently Used Expense Types

All Expense Types

Select one of the expense types below

Airfare (5514) Other (5514) Baggage Fee (5514) Personal Car Usage (5514) Ground Transportation (5514) Recruiting-Candidate Travel & Meals-HR Only (5384) Hotel (5514) Visa/Passport/Immigrations (5514)

- 6. Click on the expense on the left-hand side and then click **Attach Receipt**

US Schools conference

+ New Expense + Quick Expenses Details Recepts Print / Email

Exceptions

Expense	Date	Amount	Exception
Airfare (5514)	10/02/2015	USD 125.00	Please ensure you attach your pretrip quote

Expenses

Date	Expense	Amount	Requested
10/02/2015	Airfare (5514) Southwest Airlines, Seattle, Washi	£82.59 USD 125.00	£82.59

Please ensure you attach your pretrip quote

Expense

Expense Type: Airfare (5514) Transaction Date: 10/02/2015 Business Purpose: Vendor: Southwest Airlines

Comment: City: Seattle, Washington

Amount: 125.00 USD Rate (GBP=1 USD): 0.66070000 Amount in GBP: 82.59

Tax Posted Amount: Passenger Name (if available): Ticket Number (if available):

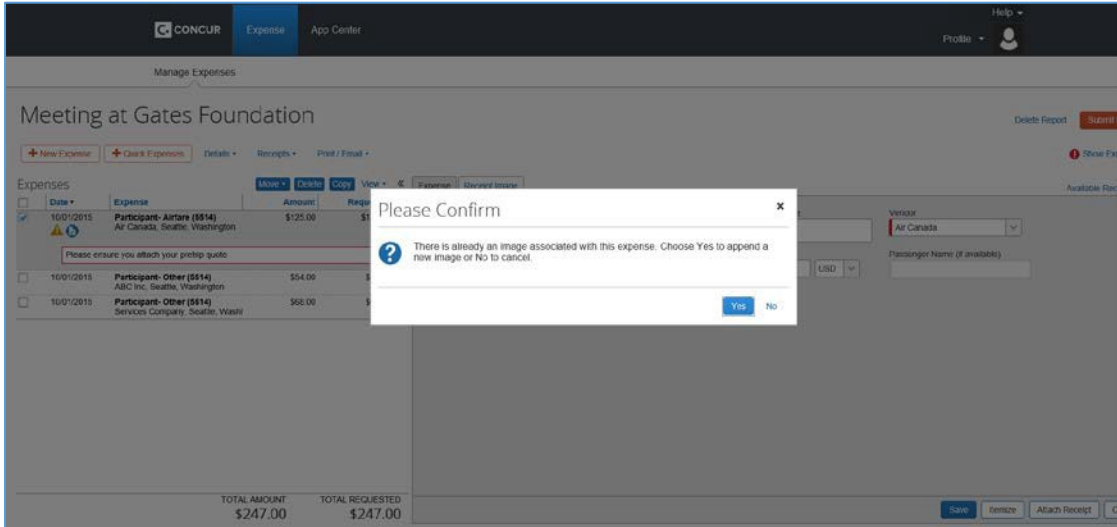
TOTAL AMOUNT: £82.59 TOTAL REQUESTED: £82.59

Save Remove Attach Receipt Cancel

Follow the on-screen instructions to attach a receipt and click **Save**

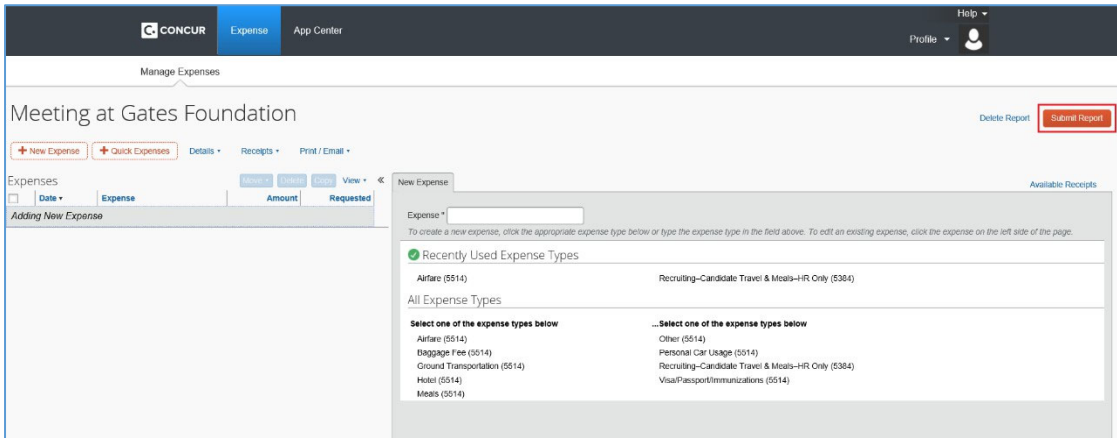
7. To add supplemental receipts/documentation

- Click the Attach Receipt button again (as shown above)
- To confirm that you would like to append the image, click **Yes**

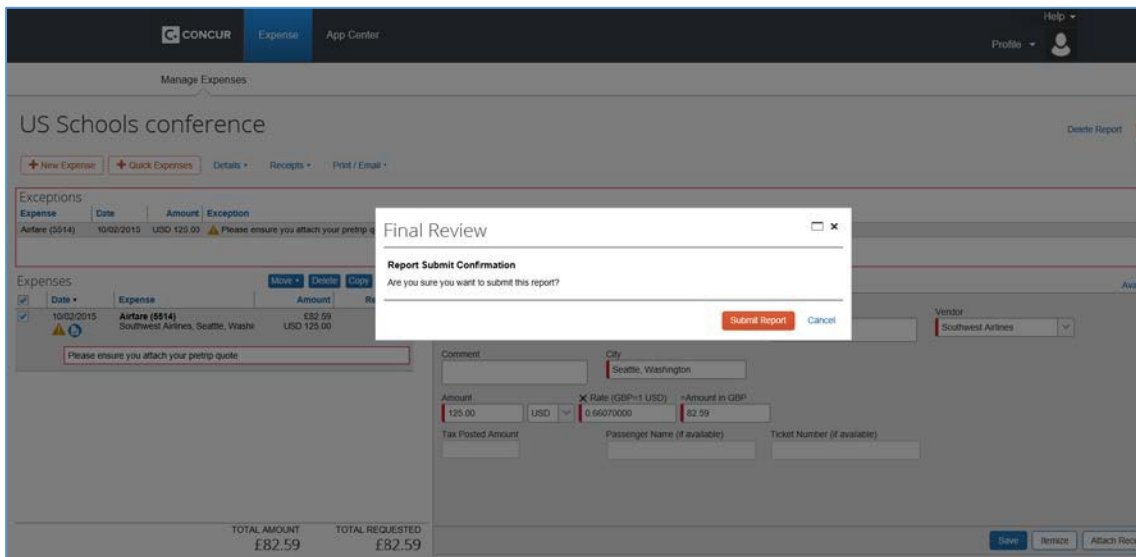


Follow the on screen instructions to attach a receipt and click **Save**

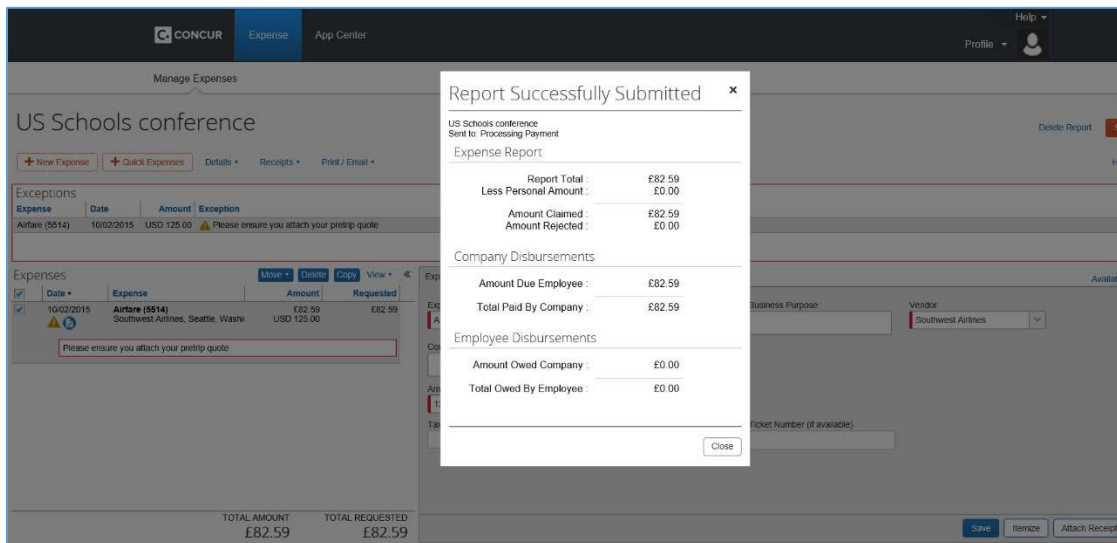
8. After you have added all expenses and attached required documentation, click **Submit Report**



- You will have the opportunity for a final review of your expense report. Click **Submit Report** or **Cancel**



- Your expense report is generated, and you will receive an onscreen summary of your report being successfully submitted.

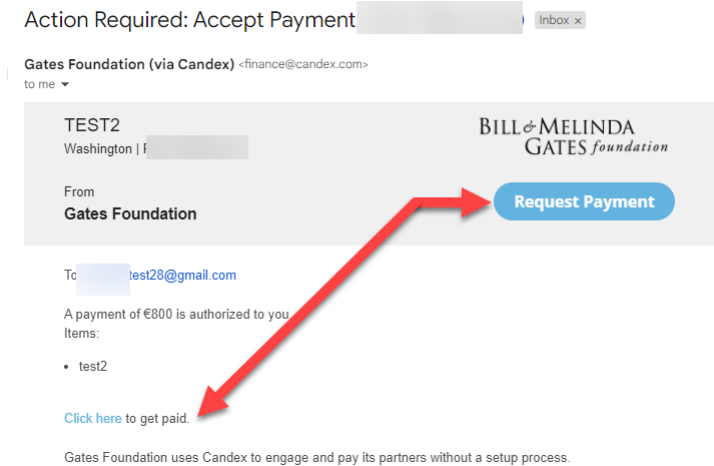


Note: Once you've submitted your expense report, it cannot be edited or recalled. If you need to submit additional expenses, simply create and submit a new report.

For questions, refer to the FAQs on page 5.

Payment Reimbursement via Candex

1. After your expense report has been approved, you will receive an email (same email that you receive the initial Welcome email from) from Candex to register and provide banking information.
2. Click on either the Request Payment or on the Click here to get paid.



3. Register in Candex
 - You must select payment is to me personally
 - Option to select language
 - Highly suggest selecting to receive the optional notifications to receive updates on payments

Candex makes it easy to pay and get paid

Email (change user) [redacted] test28@gmail.com Language English

This payment is to my company
 This payment is to me personally

First Name [redacted] Last Name Test

Phone 2068888888 office

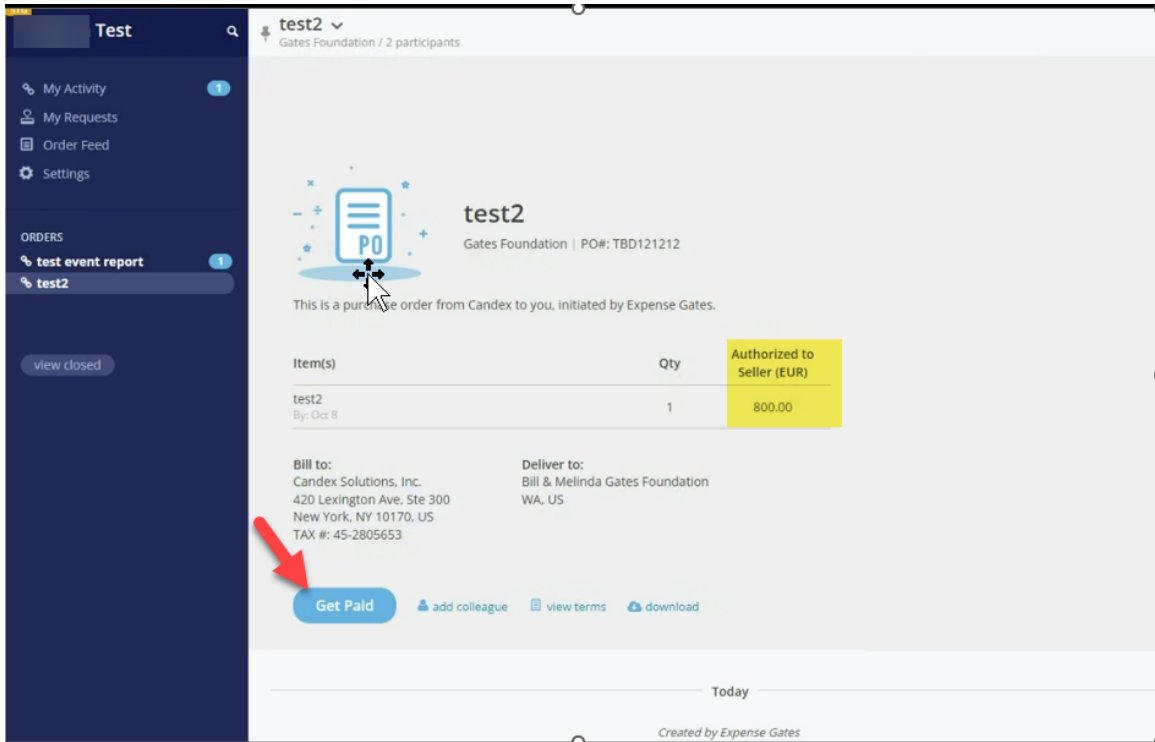
Password [redacted] Confirm Password [redacted]

good

I agree to the Candex Terms Of Use and Privacy Policy
 I agree to receive Candex updates through email (optional)

Register Now

- Verify the amount listed is correct then click Get Paid



- Enter in your personal and bank details. Note that you will need to upload a bank statement or voided check for bank verification. Click Save.

The screenshot shows the 'Edit Entity' form with the following details:

Personal Details

- Name: test
- Country: United States
- Address: 12345 12 ave
- City: seattle
- Zip Code: 98104
- State/Region: WA
- Tax Classification: Individual / Sole Proprietor

Bank Details

- Bank Country: Spain
- Account Currency: EUR
- Bank Name: test
- Account Holder Name: test
- SWIFT/BIC: [empty]
- IBAN: E [empty]

Bank Verification

Use bank statement or voided check

Test_bank_verification.docx @replace

[Save](#)

- Verify details are correct then click Submit.

Request Payment

test2
PO#: TBD121212 | Gates Foundation [Invite Finance](#) [View Terms](#)

After you request payment and Candex verifies your banking information, Candex will invoice Buyer. Payment terms are 5 days from the date Candex invoices Buyer and Candex will pay you within 3 business days of receiving payment from Buyer.

Pay to (US /EUR) Meghna test x edit

Account: test *****1332

Bill to:
Candex Solutions, Inc.
420 Lexington Ave, Ste 300
New York, NY 10170, US
TAX #: 45-2805653

Deliver to:
Bill & Melinda Gates Foundation
WA, United States

Item (EUR)	Amount	[No Title]
test2 <small>By: Oct 8</small>	800 <small>up to 800</small>	

Amount	800 EUR
Tax	0
Total Invoice	800

Submit
Skip for now

7. Payment will be sent electronically in approximately 10 days.