Published on *University of Colorado* (https://www.cu.edu)

Terminated Employees with Unsubmitted Transactions in Concur [1]

February 1, 2023 by Staff [2]

Departments and employees are encouraged to resolve and submit all outstanding card transactions in Concur before their last day of employment. Discovering unreconciled expenses in Concur following an employee's last day of work should be infrequent, however we understand that it does happen. Historically, departments with an employee who terminated before reconciling all Commercial Card transactions would work with the PSC to have those charges reassigned to a remaining *active* employee who is also a cardholder. That active cardholder employee would then prepare and submit those expenses left by the separated employee from their own Concur profile.

For 2023 and forward, we are pleased to share that these unsubmitted transactions will now remain in the terminated employee's Concur profile, and a Delegate will be able to prepare and submit a report for those transactions *on the terminated employee's behalf.* This will keep the aging transactions in the profile of the employee who incurred them while still allowing for the department to complete the reconciliation of the business expenses on that employee's behalf. An existing Delegate for the terminated employee can complete this process, or a new Delegate can be assigned by the PSC at the department's request.

While the PSC will be monitoring for these unsubmitted transactions, departments are encouraged to reach out to the PSC as soon as they become aware of unsubmitted transactions in an inactive employee's profile. The PSC will work with the department to ensure the identified Delegate has the appropriate access to prepare and submit the transactions on behalf of the separated employee. The ability of a Delegate to submit reports for an inactive employee can only be enabled by the PSC, so Delegates cannot take this final processing step without first contacting PSC@cu.edu [3] for assistance.

As a reminder, **Concur does *not* allow Delegates to submit expense reports on behalf of *active employees***. This revised process only applies to **inactive** employees. This functionality allows current employees to maintain separation of expenses belonging to other employees that could result in tax reporting for the individual who incurred the expense(s).

Please refer to the revised Finance Procedural Statement for Business Expense Substantiation & Tax Implications [4] for additional information on the potential tax consequences of unsubstantiated business expenses.

Delegate [5], Concur [6]
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