



## Task Checklist

<https://www.concursolutions.com>

There are a number of processes to perform manually to set up your details on Concur:

	Task to complete	Completed?
1	Log in: email as user name, password = password	
2	Change your password	
3	Verify your email address	
4	Enter bank account details	

For help on the expenses policies and system features go the BMA website:

<http://bma.org.uk/committeexpenses>

If you encounter any problems with your account then please email [concur.queries@bma.org.uk](mailto:concur.queries@bma.org.uk)

## Applying for a Concur account

If you have previously claimed expenses you should already have an account created and should have received a welcome email with details. If you did not receive this email then you should sign into the BMA website and apply for an expenses account at: <http://bma.org.uk/committeexpenses>



Home > About the BMA > How we work > Claiming committee expenses

### Committee expenses

**About the BMA**

- Leadership
- What we stand for
- Working at the BMA
- Equality and inclusion
- Our history
- How we work**
  - UK and national councils
  - Negotiating committees
  - Regional representation
  - Local representation
  - Professional

#### A guide to claiming expenses using Concur

The BMA's new expenses system, Concur, makes claiming expenses more straightforward, meaning a simpler, faster way for committee members to claim expenses associated with attending BMA-related events, conferences and meetings.

An overview on how to claim expenses via Concur is outlined below, with links to downloads for further information if required.

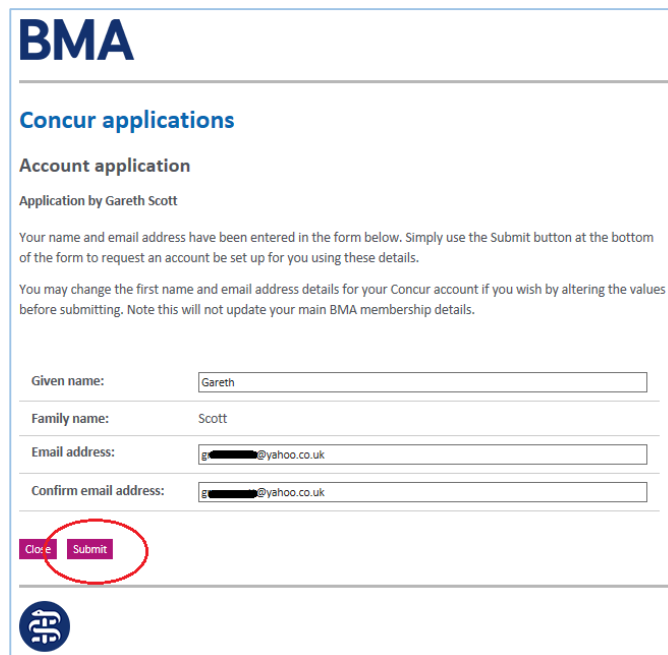
In order to access the expenses system, **you will first need to apply for user rights**. The process will take under two minutes of your time - simply visit [bma.org.uk/concurapplication](http://bma.org.uk/concurapplication)

#### Expenses you can claim for

Key expense types include

- Travel (including motor vehicle (NB, your car does not need to be registered as

Use the link on this page or go to <http://bma.org.uk/concurapplication> to submit your details using the form as shown:



## BMA

### Concur applications

#### Account application

Application by Gareth Scott

Your name and email address have been entered in the form below. Simply use the Submit button at the bottom of the form to request an account be set up for you using these details.


You may change the first name and email address details for your Concur account if you wish by altering the values before submitting. Note this will not update your main BMA membership details.

Given name:

Family name:

Email address:

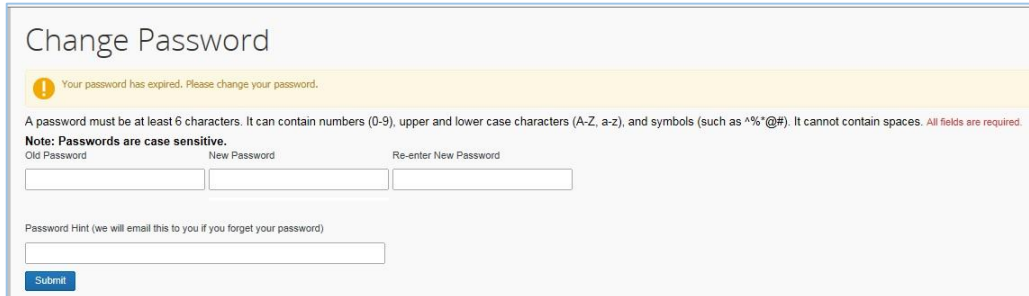
Confirm email address:



The BMA finance department will create an account and send you the welcome pack email.

## Log in and change password

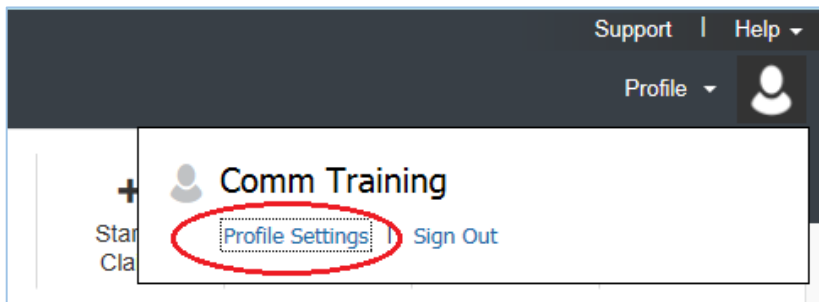
- Go to the <http://www.concursolutions.com> website
- In the User Name field enter your **registered email address**
- Enter the initial password = **password**
- Click **Login**
- You will be prompted to change to a new password for your account:



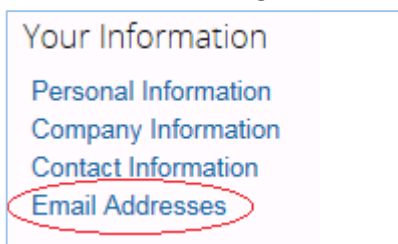
- Enter your choice of password then enter it again as verification
- Click **Submit**

## Verify email address

- At the top of the My Concur page, click **Profile** and choose **Profile Settings**



- On the left hand navigation choose the **Email Addresses** link



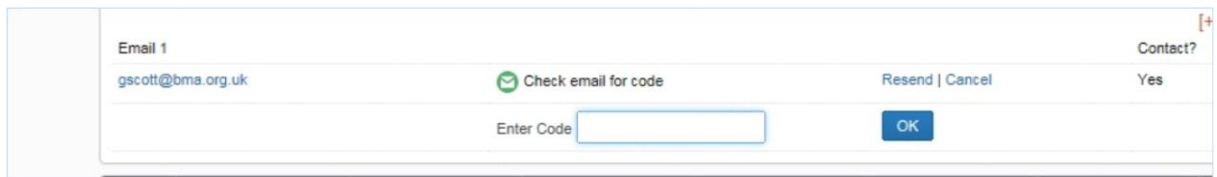
- Check your email address appears correctly
- Click on the **Verify** link next to the email address. The system sends an email to you.



- **Open** your email inbox and open the confirmation email and locate the **Verification Code**:



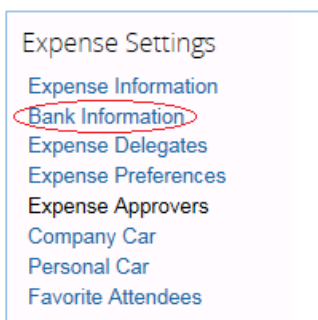
- **Copy** the verification code from the email and **paste** it into the box provided on the concur web page:



- Click **OK**
- You can now send emails, photos or scanned receipts to **receipts@concur.com**

## Enter Bank account details

- Click on the **Bank Information** link



- Enter your **Bank Sort Code** and **Bank Account Number**
- Enter your **Bank Name**, **Branch location**, **Account Owner Name** and **Bank Address** – Fields marked with a red bar are compulsory
- Click **Save**
- The Concur system will deposit 1p into your bank account overnight to confirm the bank account is valid

Full instructions on using the Concur system are available on the **BMA website** at:

<http://bma.org.uk/committeexpenses>

If you encounter any problems with your account then please email [concur.queries@bma.org.uk](mailto:concur.queries@bma.org.uk)