



How to itemize Utah sales tax in Concur



Agencies can get a refund from the Utah State Tax Commission for Utah sales tax **paid by the state**. For example, if you were charged Utah sales tax when buying something with your p-card, your agency could request a refund for that sales tax.

If your agency wants to request a sales tax refund, you need itemize Utah sales tax and assign it to the right object code so it's recorded correctly in the state's accounting software.

See [page 5](#) for how to itemize Utah sales tax in a p-card reconciliation.

How to itemize Utah sales tax in a reimbursement request

If you traveled in Utah and paid with your p-card, you can itemize the sales tax in your reimbursement request. In this example, we'll itemize the sales tax for a lodging expense.

In the data entry screen for the lodging expense, click the **Itemizations** tab.

The screenshot shows the SAP Concur Expense entry screen for a Lodging Reimbursement of \$200.00. The 'Itemizations' tab is highlighted with a red box and a red arrow. The 'New Itemization' section shows 'Expense Type' set to 'Lodging Reimbursement' and 'Entry Type' set to 'Recurring Itemization' for dates 12/25/2023 - 12/27/2023 (2 nights). There are input fields for Room Rate, Room Tax, Tax 2, and Tax 3 per night. An 'Add Receipt' button is visible on the right side of the form.

In the **Room Tax (per night)** field, enter the amount of the sales tax. In this example we'll enter **20.00**.

Lodging Reimbursement \$200.00
12/27/2023 | Allegro Resorts

Details | **Itemizations**

Amount: \$200.00 | Itemized: \$0.00 | Remaining: \$200.00

New Itemization * Required field

Expense Type: Lodging Reimbursement

Entry Type: Recurring Itemization | 12/25/2023 - 12/27/2023 (Nights: 2)

Your hotel room rate was: The Same Every Night | Not the Same

Room Rate (per night)*	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
90.00	20.00		

(Amounts in USD) Add Tax Fields



If your room rates were different each night, you'll select **Not the Same**. You'll see multiple Room Tax fields. Enter the total amount of sales tax in the first **Room Tax** field.

Expense Type: Lodging Reimbursement

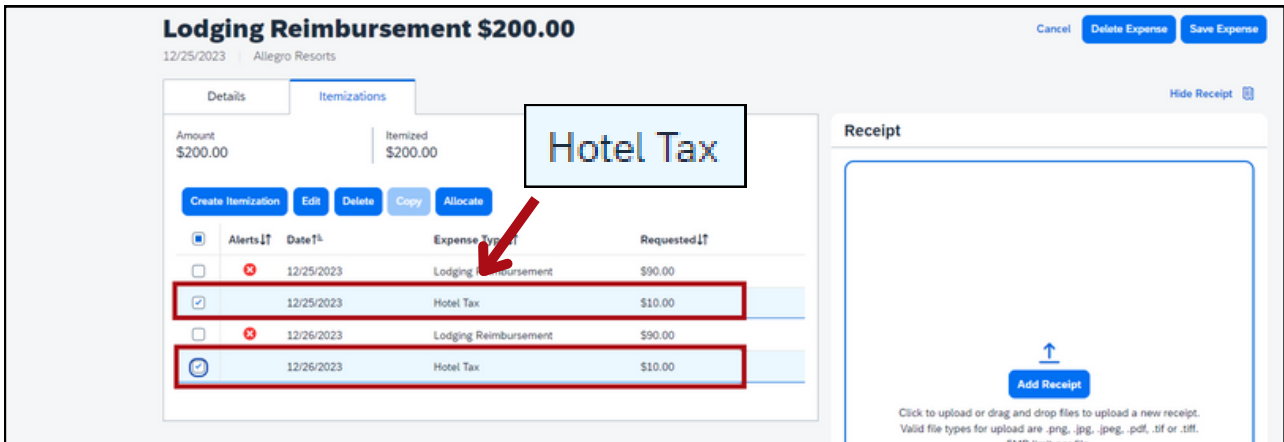
Entry Type: Recurring Itemization | 12/25/2023 - 12/27/2023 (Nights: 2)

Your hotel room rate was: The Same Every Night | **Not the Same**

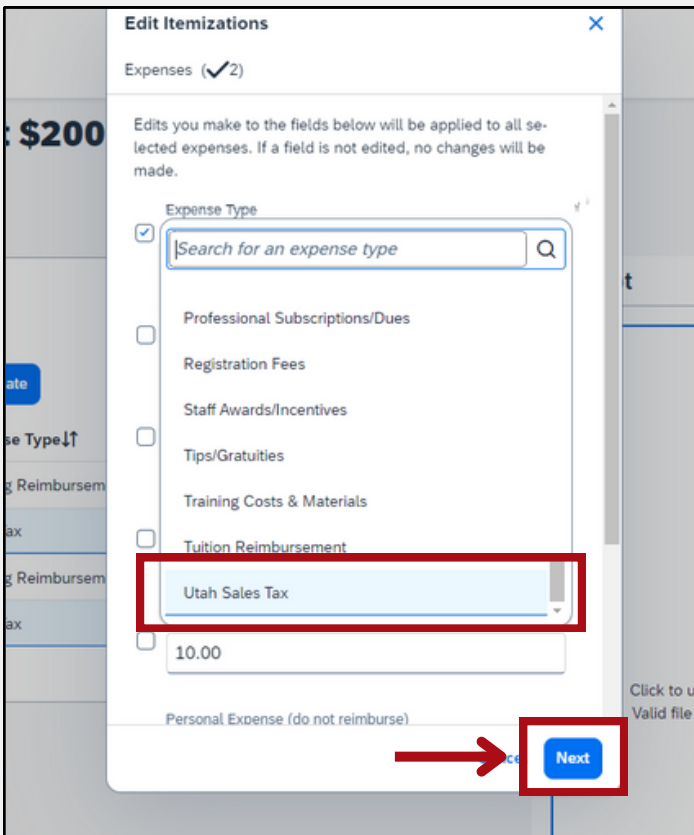
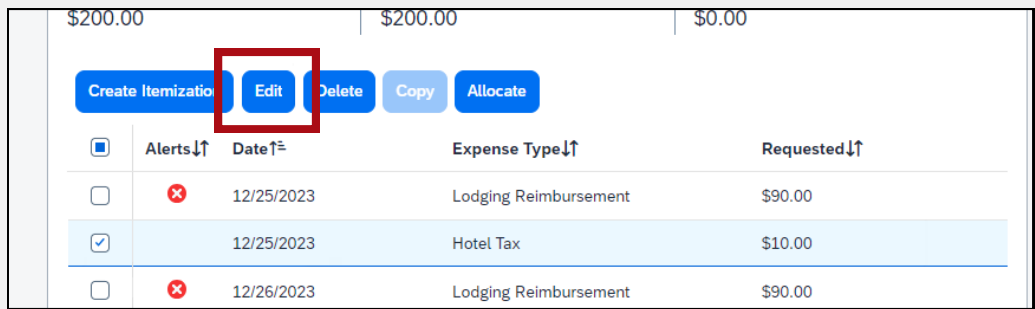
Date	Room Rate*	Room Tax	Tax 2	Tax 3
12/25/2023		20.00		
12/26/2023				

(Amounts in USD) Add Tax Fields

Now the Itemizations tab shows the sales tax as separate line items labeled **Hotel Tax**. Select these **Hotel Tax** expenses.



Click the blue button **Edit**.

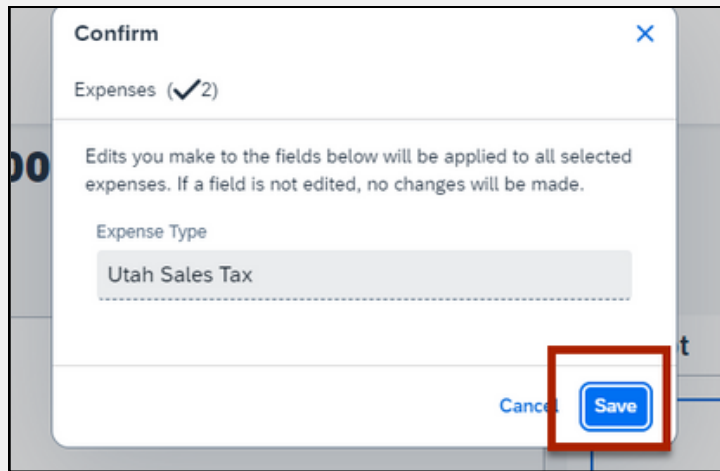


In the search field, search for **Utah Sales Tax** and select it from the list.

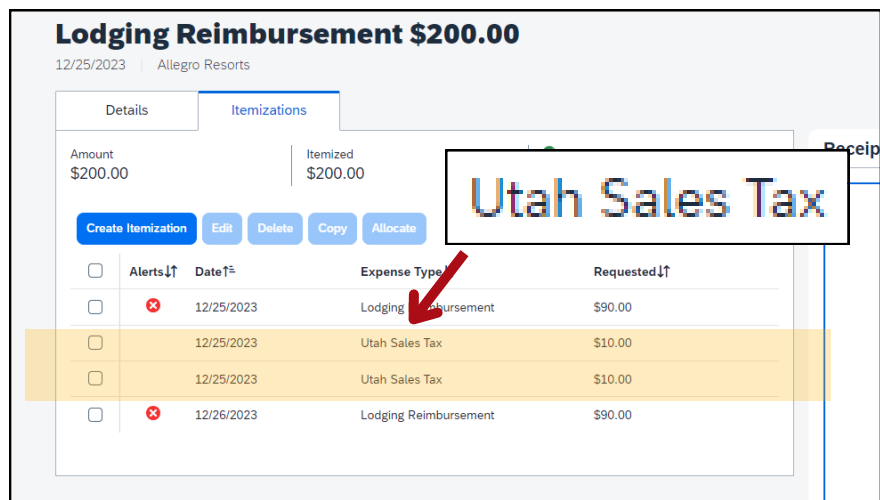
Click **Next**.

You should see **Utah Sales Tax** in the Expense Type field.

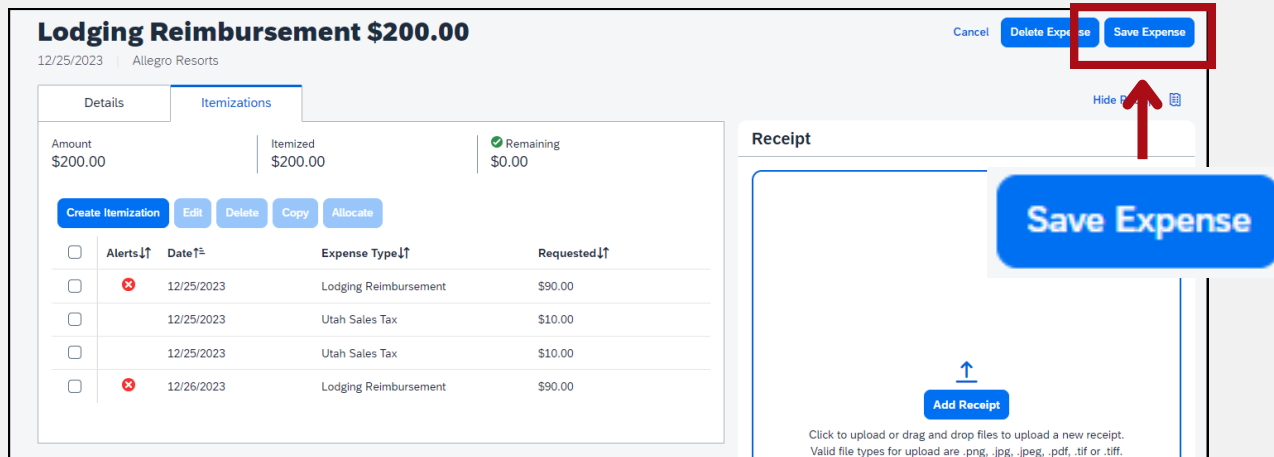
Click **Save**.



Now you'll see the expense type labeled as **Utah Sales Tax**.



Click the blue button **Save Expense**.



Now the sales tax will be recorded in the state's accounting software as object code 6297.

How to itemize Utah sales tax in a p-card reconciliation



If you were charged Utah sales tax when using your p-card, you should itemize the sales tax for that expense in your p-card reconciliation. In this example, we'll itemize the sales tax for an office supply expense.

In the data entry screen for the office supply expense, click the **Itemizations** tab.

Office Supplies and Materials

09/14/2023 | AMZN MKTP US*TX3N14ZJ2 | Corporate Card

Itemizations

Details

Amount	Itemized	Remaining
\$199.99	\$0.00	\$199.99

Create Itemization Edit Allocate

No Itemizations.
Create itemizations for the items on your receipt.

Receipt

Add Receipt

Click to upload or drag and drop files to upload receipts. Valid file types for upload are .png, .jpg, .jpeg.

First we'll itemize the office supplies.

Click **Create Itemization**.

Office Supplies and Materials \$199.99

09/14/2023 | AMZN MKTP US*TX3N14ZJ2 | Corporate Card

Details Itemizations

Amount	Itemized	Remaining
\$199.99	\$0.00	\$199.99

Create Itemization Edit Allocate

From the **Expense Type** drop-down menu, select the correct expense type for the item. For this example, we'll select **Office Supplies and Materials**.

The screenshot shows a form titled "Office Supplies and Materials \$199.99" with a date of 09/14/2023 and transaction ID AMZN MKTP US*TX3N14ZJ2. It is categorized as a "Corporate Card". The form has two tabs: "Details" and "Itemizations". Under "Itemizations", there is a summary table:

Amount	Itemized	Remaining
\$199.99	\$0.00	\$199.99

Below the table is a "New Itemization" section with a red box highlighting the "Expense Type" dropdown menu. The dropdown currently shows "Search for an expense type". There are three buttons at the bottom: "Save Itemization", "Save and Add Another", and "Cancel".

In the **Amount** field, enter the cost of the office supplies.

For this example, we'll enter **195.00**.

The screenshot shows the "New Itemization" form with the "Amount" field highlighted by a red box. A red arrow points from the callout box to the "Amount" field. The callout box shows "Amount *" with the value "195.00". The form includes the following fields:

- Expense Type: Office Supplies and Materials
- Transaction Date: 09/14/2023
- Business Purpose: Business Meeting
- Enter Vendor Name: AMZN MKTP US*TX3N14ZJ2
- City of Purchase: Seattle, Washington
- Receive Date & Receive Person: 10/01/2023 - Keesha Calloway
- Contract Number: (empty)

There is a "Personal Expense" checkbox and a "Comment" field at the bottom.

Click the blue button **Save Itemization**.

The image shows two buttons: a blue "Cancel" button and a larger blue "Save Itemization" button.

Now we'll itemize the sales tax.

Click **Create Itemization**.

	Amount	Itemized	Remaining
	\$199.99	\$195.00	\$4.99

	Date ↑	Expense Type ↓	Requested ↓
<input type="checkbox"/>	09/14/2023	Office Supplies and Materials	\$195.00

From the **Expense Type** drop-down menu, select **Utah Sales Tax (directly Paid by Agency)-Refundable**.

In the **Amount** field, enter how much you were charged for sales tax. In this example, we'll enter **4.99**.

Expense Type *
Utah Sales Tax (directly Paid by Agency)-Refundable

Amount *
4.99

Click the blue button **Save Itemization**.

Cancel Save Itemization

Now you'll see the sales tax labeled as Utah Sales Tax (directly Paid by Agency)-Refundable.

Office Supplies and Materials \$199.99

09/14/2023 | AMZN MKTP US*TX3N14ZJ2 | Corporate Card

Amount \$199.99 | Itemized \$199.99 | Remaining \$0.00

Utah Sales Tax (directly Paid by Agen...)

Date	Expense Type	Requested
09/14/2023	Office Supplies and Materials	\$195.00
09/14/2023	Utah Sales Tax (directly Paid by Agen...)	\$4.99

Click the blue button **Save Expense**.

Office Supplies and Materials \$199.99

09/14/2023 | AMZN MKTP US*TX3N14ZJ2 | Corporate Card

Amount \$199.99 | Itemized \$199.99 | Remaining \$0.00

Save Expense

Date	Expense Type	Requested
09/14/2023	Office Supplies and Materials	\$195.00
09/14/2023	Utah Sales Tax (directly Paid by Agen...)	\$4.99



Now the sales tax will be recorded in the state's accounting software as object code 6297.