TRAVEL AND EXPENSE AT PENN

Penn uses Concur for e-travel booking & expense reimbursement.

EXPENSE REPORT

Step 1: Individual creates & submits expense report. The individual incurring the expense must be the one to hit the Submit button.

Step 2: Report moves through approval process in Concur. If rejected, the report is returned to the individual in Concur, w/comments from approver.

Step 3: Approved expense report is processed for payment. Payment is received 4 to 7 days from final approval (expect processing time to take 2 weeks for all approvals to be completed);
- Penn Travel Card transactions will be paid directly to the credit card company.
- Reimbursement of out of pocket business expenses paid by an individual will be sent directly to the direct deposit account that is used by Penn payroll (ADP/Visa Paycard).

Receipts should be in a digital format (scanned), and must be readable and verifiable. To attach receipts to a Concur expense report either:
- Email receipts from your mobile to receipts@concur.com. Before emailing 1st receipt, do verification through Concur profile
- Upload scanned receipts directly into a Concur Expense Report from your computer

Delegates:
Individuals may choose to assign another person to prepare their expense reports on their behalf.

Policies:
For questions regarding policies (what is and is not allowable for reimbursement call 215-746-4357).

Tips and Tricks for the TEM system:
For technical support or how to submit/create specific expense lines/reports call 6-HELP to speak to a Concur specialist. Step by step training guides are available at BENHelps ➔ TEM section, here.

GUIDELINES FOR REIMBURSEMENTS

In order to expedite expense reimbursement, please adhere to the policies below:

1) Submit reimbursements within 10 days of the conclusion of your trip/event.
2) Reimbursements for individuals not affiliated with Penn (guest, visitor, etc.) cannot be processed through Concur. They must be reimbursed through the Penn Marketplace/supplier portal.
3) All meals require itemized receipts. Submit actual expenses when traveling. Per Diem is allowable for locations where receipts aren’t commonly available, but must be approved by Business Office prior. P.D. will be 50% of State Department rates, unless otherwise noted.
   - Meal reimbursements must list attendees
4) Business meals with staff and/or visitors must conform with the policy as documented in Travel Policy 2359. Total meal costs (with tax, tip & drinks) are limited to $100/person for dinner & $50/person for lunch or breakfast. Reimbursement will be limited to this amount without prior approval from the Business Office.
5) Meals with other Penn colleagues in local restaurants are generally not reimbursable. Local meals with colleagues should be considered a personal expense unless the business being conducted is such that it cannot be done in the office.
6) Hotels must be itemized by room rate, room tax, parking, internet, and other reimbursable charges. Itemize Hotel Expense Directions
7) Alcohol-No alcohol charges are reimbursable when dining alone, or exclusively with Penn colleagues. Alcohol expenses related to University-related business meals with attendees should be kept to a minimum and within reason.
8) Exceptions: Do not submit your report with exceptions. When you see this icon-⚠️-fix the warning, or provide comment addressing.
9) BOA Card expenses will automatically flow into Concur. This may take up to 5 business days. Move these transactions onto an expense report rather than manually entering them.
10) Ubers: Rides must be for a business purpose. List travelers, destinations and purpose. Rides home from work are not reimbursable, unless attending a work function that ends after 8pm.

Additional Questions: Ask the Penn Global Business Office!