



TRAVEL AND EXPENSE AT PENN

Penn uses Concur for electronic, integrated travel booking and expense reimbursement.

EXPENSE REPORT

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

Step 2: Report moves through the approval process electronically in Concur. If rejected, the report is returned to the individual's account in Concur with comments from the approver.

Step 3: Approved expense report is processed for payment. Payment is received 4 to 7 days from last approval.

- Penn Travel Card transactions will be paid directly to the credit card company.
- Reimbursement of out of pocket business expenses paid by cash/personal credit card will be sent directly to the direct deposit account set up in your Concur profile.

Receipts need to be in a digital format (scanned), no paper is acceptable, and must be readable and verifiable. There are 2 options for attaching your receipts into a Concur expense report

- Email receipts from your mobile device to receipts@concur.com. Before emailing your first receipt, do the verification email step in your Concur profile.
- Upload scanned receipts directly into a Concur Expense Report from your computer

Note: 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.

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

For technical support or tips and tricks, please visit the [Ben Helps Support Portal](#).

Additional Questions: Ask your Business Office

GUIDELINES FOR REIMBURSEMENTS

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

- 1) 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.
- 2) **All meals require itemized receipts or for overnight stays per diem** is allowable. Note: Meal reimbursements for meals with attendees must list attendees. Please see [meal per diem reimbursement memo](#) for guidelines.
- 3) Food purchases should be in relation to a business meeting as documented in [Travel Policy 2359](#). Meal costs are limited to \$100/person for dinner, \$50/person for lunch, and \$50/person for breakfast. Anything above those limits require a pre-approval from the Business Office. If seeking individual meal expenses when traveling on an out of town business trip, reimbursements should not exceed the applicable federal daily per diem rate for that area ([USPerDiemrates](#), [ForeignPerDiemrates](#))
- 4) **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.
- 5) **Hotels** must be itemized by room rate, room tax, parking, internet, and other reimbursable charges. [Itemize Hotel Expense Directions](#)
- 6) **Alcohol** expenses related to University-related business meals with attendees should be kept to a minimum and within reason.
- 7) **Uber/Lyft** rides must be for business purpose. List travelers, destination and purpose. Rides home from work are not reimbursable, unless attending a work function that ends after 8PM.
- 8) **Personal Vehicle Mileage** Please see the following [link](#) regarding the reimbursement of personal vehicle business mileage.

Note: Do not submit your report with exceptions.

When you see this icon -  - fix the warning or provide comment addressing.

Updated: July 2024