

# Student Travel

Use this brief section when the payment is connected to travel, conferences, professional meetings or course- and research-related activity.

## Look for:

- Required course or degree research
- Penn research/official business
- Concur vs. SRFS vs. Non-PO
- International travel requirements

# Student Travel: High-Level Look

## Required for course credit?

Route through Student Financial Services when travel is required for a course or formal degree requirement.

## Required research for MA/MS/PhD degree?

Route through Student Financial Services when travel is required for degree.

## Presenting Penn research or official business?

Use Concur; Business Related & Educational Travel Certificate Form may be required depending on scenario.

## Personal enrichment / attendee only?

Use Non-PO payment request in Penn Marketplace.

**Concur expenses must follow Penn travel policy.**

**All international travel of recognized student groups must be booked through World Travel.**

**Students are encouraged to register all international travel with [Global Support Services](#).**

# Student Travel

Rules to know and follow

**Research and Course Related Travel** | travel required or to fulfill specific degree requirements for the students's academic program (formal degree requirement)

| Student Activity                                                                                                                  | Description and Examples                                                                                                                                                                                                                                             | Payment Type/Reporting Form                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Course-related travel:<br>Travel required as part of a course or in order to receive credit for a course requirement <sub>4</sub> | <p>Payments made to a student for travel required to receive credit for a course that is required for their course of study.</p> <p>Student travels as part of a global integration course Student travel for an international exchange or study abroad program.</p> | <p>Student Financial Services</p> <p>1098-T (non-qualified only) (US)<br/>1042-S (non-resident alien)</p>              |
| Travel to conduct research required to meet the requirements of a research degree (MA, MS, PhD only).                             | <p>Student travels to conduct research necessary for their dissertation or degree completion.<br/>(E.g., Penn Global Dissertation Grants, SAS Dissertation Research Awards)</p>                                                                                      | <p>Student Financial Services</p> <p>1098-T (non-qualified only) (US)<br/>1042-S (non-resident alien)</p>              |
| Travel to conduct research or scholarly activity NOT required as part of course of study or employment.                           | <p>Student conducts research or other scholarly activity which is primarily for their own enrichment or professional development, whether or not they will produce a deliverable.</p>                                                                                | <p>Non-Po Payment</p> <p>1099-MISC (for payments aggregating \$2,000 or more) (US)<br/>1042-S (non-resident alien)</p> |

# Student Travel

Rules to know and follow

| Conferences and Professional Development Activities                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                  |
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| Student Activity                                                                          | Description and Examples                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Payment Type/Reporting Form                                                                                                                                                                                      |
| Student is <b>presenting</b> research or scholarly work conducted at Penn                 | <p>Student is presenting research or similar scholarly work conducted at Penn at an academic conference or professional meeting</p> <p><i>For example,</i></p> <ul style="list-style-type: none"> <li>• Student is <u>presenting</u> their own research conducted at Penn at a conference.</li> <li>• Student is presenting research conducted in connection with sponsored project or grant</li> <li>• A Penn faculty member invites a student to a conference to help him/her present the faculty member's research</li> </ul> | <p>Concur*</p> <p><i>*Business Related &amp; Educational Travel Certifications Form required</i></p> <p>Potentially reportable on W-2 if submission is not received within the 60-day submission requirement</p> |
| Student is engaging in defined activities on behalf of the University (official business) | <p>Payment for travel in connection with formal responsibilities or duties related to Penn employment or to engage in clearly defined activities constituting official University business. See additional examples in references <sup>5</sup></p> <p><i>For example:</i> assisting with recruitment activities, assisting a professor with a workshop based on the faculty member's research, SAC recognized student club activities, etc.</p>                                                                                  | <p>Concur*</p> <p><i>*Business Related &amp; Educational Travel Certifications Form required</i></p> <p>Potentially reportable on W-2 if submission is not received within the 60-day submission requirement</p> |

# Student Travel

Rules to know and follow

## Conferences and Professional Development Activities, continued

| Student Activity                                                                                                                                                          | Description and Examples                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Payment Type/Reporting Form                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Student is selected to participate in a scholarly competition or challenge on behalf of the University                                                                    | The student was specifically selected or designated by Penn to serve as a representative in an external competition or challenge and is representing Penn in an official capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p>Concur*</p> <p><i>*Business Related &amp; Educational Travel Certifications Form required</i></p> <p>Potentially reportable on W-2 if submission is not received within the 60-day submission requirement</p>                                                                                                                                                                                                     |
| Student is attending or participating in a conference or other educational / professional activity primarily for their own personal, professional, or academic enrichment | <p>Payments made to student to enable them to attend a conference or engage in other educational activities that are NOT required as part of their course of study, nor related to performance of services to UPENN</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• Student is attending a conference or professional meeting as an attendee and does not present or appear in the conference program. Primary purpose may be networking, academic enrichment, or career development.</li> <li>• Department awards funds to support student travel to participate competitively-based professional development opportunities or internships.</li> <li>• Student travels abroad for language training which will assist with proficiency, but it not a required part of the degree.</li> <li>• A student organization sponsors individual members to attend or participate in a conference, where the primary benefit and purpose is the individual enrichment or benefit to participants</li> <li>• Student entered a scholastic competition independently and is participating for personal or individual enrichment purposes only.</li> </ul> | <p>Non-PO payment request in the Penn Marketplace</p> <p>Pre-arranged, flat amounts: use object code 5344, Prizes and Awards. Under Additional Information, the Type of request is “Award” or “Graduation Award.”</p> <p>Reimbursement or based on expense receipts: use object code 5345, Expense Reimbursement</p> <p>1099-MISC (for payments aggregating \$2,00 or more) (US)<br/>1042-S (non-resident alien)</p> |