

Concur Quick Tips

[Getting Started](#)

All UPenn affiliates have access to [Concur](#). Your login credentials are your PennKey and password. When you log in, your Concur landing page should look like this:

The screenshot shows the SAP Concur interface with the 'Expense' tab selected. The top navigation bar includes 'Travel', 'Expense' (highlighted), 'Approvals', and 'App Center'. The user's profile is visible in the top right. The main dashboard features a grid of metrics: '+ Start a Report', '+ Upload Receipts', '93 Required Approvals', '00 View Trips', '00 Available Expenses', and '00 Open Reports'. Below this, there are sections for 'TRIP SEARCH', 'ALERTS', 'COMPANY NOTES', and 'MY TASKS'. The 'MY TASKS' section at the bottom mirrors the dashboard metrics with large numbers and arrows: '93 Required Approvals', '00 Available Expenses', and '00 Open Reports'.

To be able to submit expense reports, you need to have an 'Expense' tab.

If you do not have an 'Expense' tab, please email travel@seas.upenn.edu with the following information:

- **Your full name**
- **Your department**
- **Your Penn ID#**

PEFS Travel will use this information to update your Concur settings and get you expense access. The updates need to run in the system overnight, so you should have expense access the day after PEFS Travel makes the updates to your account.

From the 'Expense' tab, you can generate a report for reimbursement:

Create an Expense Report (Detailed Guide) -

<https://benhelps.upenn.edu/support/solutions/articles/15000043142-create-an-expense-report-detailed-guide>

Create an Expense Report (Quick Guide) -

<https://benhelps.upenn.edu/support/solutions/articles/15000043093-create-an-expense-report-quick-guide>

Create an Expense Report (As a Delegate) -

<https://benhelps.upenn.edu/support/solutions/articles/15000043244-create-an-expense-report-as-a-delegate>

Concur Quick Tips

Business Justification / Purpose of Trip or Event

The report must include full details of the scope of assignment:

- Activity/Business purpose
- Dates
- Location
- If the reimbursee is a faculty member, he or she should specify which of their University accounts to charge.

Approvals and Account to Charge

- **Students and Staff:** The specific school, faculty member, or University organization supporting the assignment must give written approval to reimburse the traveler/reimbursee and let us (PEFS Travel) know where to charge the reimbursement. The written approval should be attached to the expense report as a receipt.
 - The written approval does not need its own expense line; however, users find it easier to list it as a miscellaneous expense with a \$0 dollar amount.
- **Faculty:** Faculty members can just notate in their report (in either the “Business Justification” or “Notes to Approver” field) which of their University accounts they would like us to charge.

IRS Guidelines – 182 Day Rule

The 182-day rule is an IRS regulation. The IRS states that any reimbursement over 6 months old becomes taxable income, unless there are extenuating circumstances. Per Penn policy 2368, transaction dates greater than 182 days require supplemental approval by the Head of the S/C or designated representative. Please enter justification for submittal delay in the comment field of your report.

Sales Tax

UPenn is tax exempt on office, research, computer software/accessories, books, and duplicating purchases. If your expense includes sales tax, you will need to exclude the amount of the sales tax from the total amount of the reimbursement. Alternatively, you can add a non-reimbursable itemization line for the cost of the sales tax.

Tips:

How to Enter a Non-Reimbursable Expense:

<https://benhelps.upenn.edu/support/solutions/articles/15000043500-enter-non-reimbursable-expenses>

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Insurance

Travel, damage, and health insurance of any kind is not reimbursable.

Exceptions:

- If insurance is required, written notice of requirement must be provided.
 - For example: Health insurance is required when applying for a visa. Written visa requirements, that say health insurance is mandatory, must be provided.
- Insurance on international car rentals is allowable.

Transactions

Transaction dates are the dates that the expenses were incurred.

- Only expenses incurred by you, for UPenn related business, can be reimbursed.
 - For example: You went site-seeing during an international business trip. Any expenses associated with the site-seeing would not be reimbursable.
 - We do not reimburse spouse/family expenses.
 - Personal incidentals (such as toiletries, cleaners, gifts, and medicines) are not reimbursable.
- Dates on the receipts must match the transaction dates on the report.
- Expenses less than \$25.00 do not require a receipt.
- Expenses \$25 and greater require an itemized receipt.
 - Receipt must show the details of the purchase, proof of payment and type of payment.
 - A credit card statement showing the expense is an acceptable form of an itemized receipt if there is additional information showing the details of the expense. If it only shows the transaction amount and vendor, it must be combined with an itemized sales receipt.
- Itineraries are acceptable as receipts only if the itinerary shows the details of the travel (starting and ending destinations, passenger information, seating class, etc.), the total amount of the ticket and proof of payment.
 - Some itineraries do not show the proof of payment on it. If this is the case, the traveler will need to provide an additional receipt, or a credit card statement, that shows proof of payment for the expense.
- If an itemized receipt is not available, a missing receipt affidavit must be completed for the expense.

Tips:

How to Complete a Missing Receipt Affidavit in Concur:

<https://benhelps.upenn.edu/support/solutions/articles/15000043647-missing-receipt-affidavit>

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Airfare

- All SEAS non-faculty, excluding lecturers, are required to use World Travel for both domestic and international airfare reservations. This includes SEAS post-docs. World Travel provides 24-hour support in case of an airfare related emergency, and in the event of a global emergency, World Travel enables Penn to keep track of the locations of their affiliates. Booking through World Travel ensures that we are meeting our Duty of Care responsibilities, and additionally, that we are in compliance with the Fly America Act when applicable. Any non-faculty member that is seeking reimbursement for flights not booked with World Travel must reach out to Laura Mohr (Mohr, Laura lmohr@seas.upenn.edu), in the SEAS Budget Office, for supplemental approval. If Laura gives her approval, a copy of her approval must be attached to your expense report.
- **Airlines must be an American Flag carrier if being charged to a grant.**
 - For international travel, the flights leaving and returning to the U.S. must be booked with an American Flag carrier. Any flight in between leaving and entering the U.S. do not need to be with American Flag carrying airlines.
 - World Travel references this list for approved U.S. flag air carriers:
https://maincampusresearch.georgetown.edu/mcr_travel_us_flag_carriers/#
- Business class is allowable, for anyone, on flights that are 5 hours or more.
- First class is not allowable.

Tips:

- The expense type for charges related to your booking (this includes booking fees and taxes) should be “Airfare”.
- The expense type for your baggage fees should be “Airline Fees”.
- The expense type for airline Wi-Fi should be “Internet Access Fees”. Airline Wi-Fi is not for leisure; business must be conducted during the flight.

Amtrak/Rail Travel

Travelers must provide justification for using Acela (Amtrak). Because of Acela’s higher prices, it should only be used when time is of the essence.

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Taxi and car services

- Justification for private car/limo services must be provided. The expense type for special private car/limo expenses should be “Private Car Service”.
- The expense type for typical taxi, Uber, Lyft, etc. expenses should be “Taxi/RideShare”.
- Both expense types cover the fare, taxes, and gratuities.

Car Mileage, Rentals and Gas

- Gas cannot be reimbursed with personal car mileage.
 - Proof of personal car mileage must be provided. The dates, starting and ending points of travel are entered in to Concur and the system calculates the \$ per mile that was allowable at the time of travel.
 - The allowable \$ per mile includes the cost of gas.
- Gas expenses must be associated with a vehicle rental.
 - Proof (itemized receipts) of the rental must be provided.
 - Personal car mileage is not reimbursable in conjunction with vehicle rental expenses.

Tips:

Claim Personal Car Mileage in Concur:

<https://benhelps.upenn.edu/support/solutions/articles/15000043505-claim-personal-car-mileage>

Conference Registrations, Membership Fees, and Subscriptions

- **Conference/Registrations Fees:** Expenses directly related to paying for registration fees associated with professional conferences/meetings (example: registration, reservation, abstract fees, etc.)
- **Dues/Memberships (Allowable):** Dues and membership fees to professional organizations
 - **Cannot be charged to grants**
- **Subscriptions:** Subscriptions to professional publications (example: magazine, newspaper, and electronic subscriptions)
 - Subscriptions must support the Individual’s job-related responsibilities.
 - **Cannot be charged to grants**

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Hotel

- Hotel receipts must show itemization of the stay, guest information, the total amount, and proof of payment.
 - Hotel expenses must be itemized in the report by day/date and expense type.
 - Itemization examples:
 - Hotel nightly rate would be called “Hotel”
 - Taxes would be called “Hotel Tax”
 - Deposits would be called “Hotel Deposits”
 - Hotel Wi-Fi would be called “Hotel Internet”
 - Hotel Wi-Fi is not for leisure; business must be conducted during the stay
 - Parking fees would be called “Parking”
 - Meals would be called “Breakfast”, “Lunch”, “Dinner” or “Snacks”
 - Etc...
- If two (or more) people are sharing the hotel room, further documentation is needed to show that:
 - A) The second individual was affiliated with Penn and their share of the expense should be reimbursed from the same source.
 - B) The second individual was affiliated with Penn and their share of the expense should be reimbursed from a different source.
 - C) The second individual was not affiliated with Penn, but the hotel rate was the same for 2 people as it is for one occupant.
 - D) The second individual was not affiliated with Penn, and I will/have adjust(ed) the cost to be reimbursed for only the single occupant room rate.

Tips:

How to Itemize Hotel Expenses:

<https://benhelps.upenn.edu/support/solutions/articles/15000043662-itemize-hotel-expense>

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Meals

Per diem/Fixed meals:

- Cannot be entered as miscellaneous
- Instructions for creating an itinerary, in Concur, to enter per diem for fixed meals: <https://benhelps.upenn.edu/support/solutions/articles/15000043540-create-itinerary-and-enter-per-diem-for-meals-fixed-meals>
- When claiming per diem/fixed meals, other individual meal expenses (breakfast, lunch, dinner, and snacks) cannot be included anywhere else in the report.

Individual meals:

- An individual meal is breakfast, lunch, dinner, or snacks.
- **Alcohol is not reimbursable with individual meals.**
- If a meal is provided by a conference as part of the conference fee, and a traveler elects to purchase a meal independent of the conference, such meals will be considered a personal expense and will not be reimbursed.
- If you paid for a co-traveler's individual meal, you can include it in your report as the respective individual meal type. You should include a comment on the expense that you paid for a co-traveler's meal. Co-travelers include UPenn affiliated group, department, or team members. A family member/friend would not be a reimbursable co-traveler.
- UPenn current policy states that individual meals, as a general rule, should not exceed the applicable [federal GSA per diem rates](#).
- Individual meals are only reimbursable if the travel required an overnight stay.
 - If there are no hotel/lodging expenses on the report, a comment must be added to the report explaining why (example: traveler stayed with friends/family, someone else covered the lodging expenses, etc.)

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Business meals:

- A business meal is a meeting meal with a clearly substantiated business purpose and is directly associated with the active conduct of University business. At a business meal, the business discussion is the primary purpose of the meal. Examples of business meals include meetings with business associates, professional colleagues, students, and others at which a bona fide business discussion takes place.
- Takes place at a restaurant
- A non-UPenn affiliate must be present.
 - If all of the attendees are UPenn affiliated, a justification for why the meeting could not take place on campus must be provided. Being on business travel is not an acceptable justification (it would instead be considered payment for individual meals while traveling).
- All the attendees, and their affiliations, must be listed on the expense.
- Alcohol is reimbursable and must be itemized.
- **Cannot be charged to grants** (unless the conference travel and attendees are part of the project)
- Meal limit per person is \$60 for breakfast and lunch and \$125 for dinner. The cost per person includes alcohol, taxes and gratuities.

Campus business meetings:

- A campus business meeting is a meeting meal with a clearly substantiated business purpose and is directly associated with the active conduct of University business. At a campus business meeting, the business discussion is the primary purpose of the meal. Example: Weekly/monthly faculty, staff, or lab meetings
- Food that is ordered and delivered, or brought back, to campus and consumed in an office/lab/meeting room.
- **Cannot be charged to grants**
- **Alcohol is non-reimbursable**
- Cost per person should be kept as economical as possible and stay within the per person meal limits
 - \$60 for breakfast and lunch
 - \$125 for dinner

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Entertainment-Other:

- Entertainment expenses are those incurred during a meal, or an event, that is business–related but social or celebratory in nature.
- Includes food and beverages, alcohol, catering services, banquet facilities, decorations, and musical groups.
- Examples: Celebrating a lab accomplishment, celebrating a publication, holiday party, lab/office moral, retirement, etc.
- **Cannot be charged to grants**

Non-reimbursable meals:

- Birthdays, weddings, births, Administrative Professional’s Day or Boss’s Day.

Exceeding the individual meal allowances:

If the per person allowance is exceeded, supplemental approval from Mike Matthews (mikemat@seas.upenn.edu), in the SEAS Budget Office, is needed. If Mike’s approval is given, his approval must be attached to your expense report.

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Other Common Expense Types

Office Supplies

Supplies used in offices/work from home space.

Example: stationery, printer paper, office snacks/coffee/drinks, etc.

Cannot be charged to grants

Research Supplies

Includes laboratory, research, and project supplies.

Computer Software and Accessories

Includes PC and printer supplies, software programs for personal computers including upgrades, annual maintenance and licenses on software, laptops, notebooks, portable computers, servers, data storage and media, disk packs, data cartridges, toner/ink cartridges, magnetic tape, laser printer accessories, computer care products and workstation accessories such as surge protectors, glare screens, diskette trays, etc.

Duplicating

Includes internal and external duplicating and printing charges, reprints, copying services, publications, and graphic design printing on objects (such as t-shirts).

Postage

Costs for courier services to ship or mail items related to UPenn business.

Training and Staff Development

Not to be confused with conference registrations; Fees associated with professional training.

Cannot be charged to grants

Immunization

Can be used for immunizations and medical testing required for traveling.

Visa-Passport

Expenses related to obtaining a visa and/or passport for UPenn business travel.

Laundry

Is only reimbursable if the travel is 5 or more days.

Phone-Cellular/Phone-Local/Phone-Long Distance

Must be used for UPenn business. Justification must be provided in the expense report.

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If you have any further questions, please refer to the Travel & Expense Management Solutions page on the BEN Helps website -

<https://benhelps.upenn.edu/support/solutions>

Or contact PEFS Travel at travel@seas.upenn.edu