

Instructions for Students Seeking Reimbursements from Penn

All students who are seeking reimbursements for University-related travel and non-travel expenses must submit their requests through the new Travel Expense Management (TEM) system using the **Concur Expense Report**. Students receiving speaker-series grants or other grants from the Student Affairs office should see a staff member from the Business Affairs office *before* incurring expenses or making travel reservations, to insure compliance with University policy and assure full reimbursement of expenses.

Below are the steps that need to be taken to be reimbursed by Penn. Please note that there are two steps that you can take now to make the reimbursement process easier.

Before Seeking Reimbursement

Step #1 – Set-Up Your Direct Deposit

If you are already set up for direct deposit through Student Financial Services or Penn's payroll (as a student worker or work-study), you can go to step 2. If not, you should do so now at the Penn-in-touch website (https://medley.isc-seo.upenn.edu/penn_portal/intouch/splash.html). If you do not sign up for direct deposit, a debit card from ADP will be mailed to your local address once you information is added to the TEM system.

Step #2 – Submit PennID and address information

At the Penn Law Business Affairs website (<https://www.law.upenn.edu/administration/businessaffairs/>), there is a link for students that anticipate needing a reimbursement for University-related expenses. Register your information at that site. Once entered, you will have access to the TEM system for reimbursement within two business days.

When Ready to Seek Reimbursement

Step #1 – Set-Up a Profile in Concur

You must have a profile set-up in the Concur system to access the expense report. The full set of instructions for setting up your profile can be found at this website: <http://cms.business-services.upenn.edu/penntravel/images/stories/tem-training-docs/cncrtr%20-%20set%20up%20profile.pdf>

NOTE: Exclude the sections on assigning an Assistant or Delegate.

TIP: Under Personnel Information, you will be required to enter a **budget administrator**.

Please search on **Ernest Gonsalves** by pressing the  to the right of the drop down arrow.



Please Enter Your Budget Administrator/Approver [Required]
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Step #2 – Set-Up a Mobile Application

You can access Concur and send digital receipts through your mobile device by following the PDF instructions; <http://cms.business-services.upenn.edu/penntravel/images/stories/tem-training-docs/cncrtr%20-%20mobile%20app%20for%20cell%20phones.pdf>.

Step #3 – How to Create an Expense Report

In order to be reimbursed you need to complete and electronically sign-off on a Concur Expense Report. The report will be electronically routed through the TEM system and reviewed for approval.

Instructions on how to create an expense report can be found in the following PDF; <http://cms.business-services.upenn.edu/penntravel/images/stories/tem-training-docs/cncrtr%20-%20exp%20rpt%20detailed%20guide.pdf>

Special Note: The Receipt Store

The University's financial policies require *itemized receipts* for expenses greater than \$25. In the new TEM system, receipts need to be in a digital format (scanned), no paper will be accepted. There are 3 options for sending your receipts to a **Concur Expense Report** into what is referred to as the **Receipt Store**;

1. Send receipt images from your mobile device to receipts@concur.com.
2. Email scanned receipts from a verified email account to receipts@concur.com.
3. Upload the scanned receipts from your computer.

The receipts need to be readable and verifiable. More information about the **Receipt Store** can be found at <http://cms.business-services.upenn.edu/penntravel/images/stories/tem-training-docs/cncrtr%20-%20receipt%20store.pdf>

TEM SUPPORT

1. On-line help

Access to Concur tips, the Concur website with access to making travel reservations, expense reports, and helpful information, call be found at the Business Affairs website:
<https://www.law.upenn.edu/administration/businessaffairs/>

2. Penn Law Business Affairs

E-mail or call any of us in Business Affairs:

Leslie Glatz	lglatz@law.upenn.edu	215.573.5065
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