**Concur General Information for BGS Students**

**August 2023**

**Please note that this is not an all-inclusive summary of travel policies. This is intended to guide BGS students in preparing their Concur reimbursement requests. Students should refer to Penn travel policies for further details.**

Please include the following information when submitting your Concur reports:

* Business Purpose

1. Who: who was traveling?
2. What: what was the business purpose?
3. When: when did you travel?
4. Where: where did you travel to?
5. Why: why was this expense incurred?

* Be Specific
  + Example: “Jane Doe traveled to NoWhere, USA on August 13th through August 15th to present a poster at the Science, Science, Science conference. Funded by BGS Travel and Mentor X.”
* If you attended a conference, please include the schedule of events/program.
* Concur Expense Report Approval Form – complete and attach for PI/Department approval for use of funds for incurred expense.

**Air and Ground Travel**

* Book the lowest airfare consistent with your itinerary, business purpose and requirements of the funding source. Travelers should book flights at least 14-21 days in advance for best pricing and seat availability.
* Travelers should book all business travel through Concur On-Line Booking Tool. World Travel is a University approved vendor and your airline ticket will automatically be charged to the University’s airline billing account
  + When booking flights outside of normal office hours, please note that approvers only have a limited window to approve and your flight may not get approved.
* Air – Coach accommodations are eligible for reimbursement. Upgrades are a personal expense to the traveler.
  + Preferred seating is a non-reimbursable expense.
  + Travel Insurance is a non-reimbursable expense.
  + International travel must provide proof of registration with [Penn Global Activities Registry](http://www.upenn.edu/globalactivities/).
* Personal mileage – Travelers may elect to use their personal car for business purposes if such is less expensive than other options, such as rental cars or taxis.
  + BGS Students must take Penn's Fundamentals of Drivers Safety course **prior** to using personal cars for business purposes.
  + Upload Driver Safety Course Certifications in Concur.
  + Gasoline expense incurred while driving to/from a Penn sponsored event in a non-reimbursable expense.
  + Mileage allowance, calculated in Concur, is an eligible reimbursable expense.
* Expenses associated with normal commuting between employee’s home and regular place of business are not reimbursable.
* Sedan/Limousine car services are not acceptable forms of transportation.
* RENTAL CARS - Travelers are authorized to use rental cars based on the cost efficiency and availability of other means of transportation.
  + Faculty, staff, authorized students must take Penn's Fundamentals of Drivers Safety course **prior** to renting cars for business purposes.
  + Upload Driver Safety Course Certifications in Concur.
  + Penn employees are expected to rent with a preferred vendor and decline the loss damage waiver (LDW/CDW) option and supplemental liability coverage.

**Hotels and Meals**

* Hotel – Travelers are expected to request standard room accommodations at reasonably priced hotels, motels, Airbnb.
  + Itemized Hotel Folio/Bills are required.
  + Shard Hotel Costs should list all persons staying at the hotel and their affiliation with the University. Please provide details of the shared costs per person, the reason for the split as well as the funding sources of the expenses per person.
* Meals – Individual and Business meals or entertainment.
  + List the names of attendees and affiliation with Penn.
  + Maximum reimbursement per meal - $25/35/80 BLD.
  + Meals over $25 are required to have an itemized receipt.
  + Segregate alcohol on business meals (include tax and tip).
  + Alcohol consumed at a single person meal is a personal expense – non-reimbursable.
  + Alcohol is prohibited on sponsored projects.
  + Sales tax and tip incurred on meals are eligible for reimbursement.

**Other Expenses**

* Subscriptions to apps, purchasing computer software/licenses – use your @pennmedicine.upenn.edu email to get the discounted student rate for these services.
* Sales Tax
  + Sales tax incurred on services (subscriptions, software, licenses, etc.) are a non-reimbursable expense.
  + Sales tax incurred on products that could be purchased in Penn’s Marketplace (computers, office equipment, books, etc..) are a non-reimbursable expense.
  + Sales tax incurred on Amazon purchases are a non-reimbursable expense.

**Non-reimbursable items**

* <https://www.finance.upenn.edu/policy/2364-travel-and-entertainment-non-reimbursable-items/>

Common University Travel and Entertainment Policies:

1. General Travel Policy Overview

<https://www.finance.upenn.edu/policy/2352-travel-and-entertainment-procurement-of-travel-entertainment-and-other-miscellaneous-goods-and-services-by-affiliates/>

1. Travel and entertainment/Meals and entertainment

<https://www.finance.upenn.edu/policy/2359-travel-and-entertainment-meals-and-entertainment/>

1. Non-reimbursable items

<https://www.finance.upenn.edu/policy/2364-travel-and-entertainment-non-reimbursable-items/>

1. International Travel

<https://www.finance.upenn.edu/policy/2361-travel-and-entertainment-international-travel/>

1. Air Travel

<https://www.finance.upenn.edu/policy/2354-travel-and-entertainment-air-travel/>

1. Rail Travel

<https://www.finance.upenn.edu/policy/2355-travel-and-entertainment-rail-travel/>

1. Lodging

<https://www.finance.upenn.edu/policy/2356-travel-and-entertainment-lodging/>

1. Receipt requirements

<https://www.finance.upenn.edu/policy/2365-travel-and-entertainment-receipt-requirements/>

1. Rental Cars

<https://www.finance.upenn.edu/policy/2357-travel-and-entertainment-rental-cars/>

1. Sponsored Projects

<https://www.finance.upenn.edu/policy/2366-travel-and-entertainment-sponsored-projects/>