

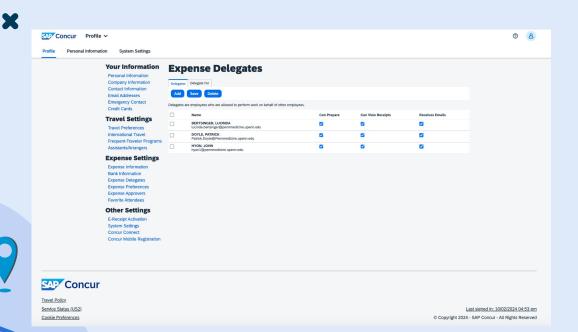


- 1. Go to: Concur Homepage
- 2. Make sure that John, Lucinda, and Patrick from the finance team are added to your account as **delegates** (this way they can review your report and make changes)
- 3. Click on **Start a Report**
- 4. Fill in the fields marked with a red asterisk
- 5. Select **Yes, I require Travel Allowance**
- 6. Make sure to name your report with the **conference name** and a way to identify you (i.e. your initials)
- 7. Note: make sure that you enter in the correct Funding Source according to Ted's list





Example: Add delegates



Note: In your **Profile Settings**, select **Expense Delegates**.



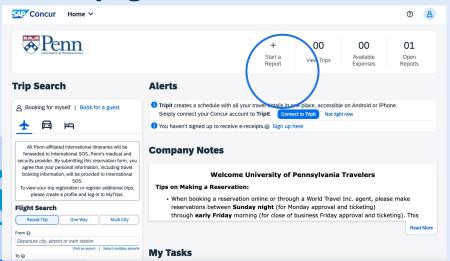




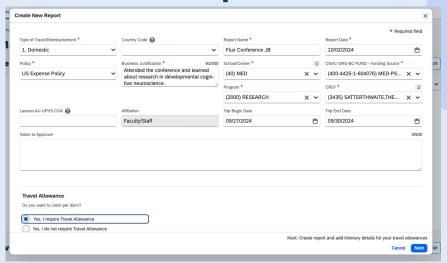
Example:

X

Home page



Create a new report





STEP 2: Begin adding in expenses

- 1. You can add all expenses (i.e. hotel, Ubers, train etc.) to one report
- 2. Add in the **FLUX program** as an additional receipt to one of the expenses (I've sent the program in the #flux_2024 Slack channel)
- 3. For each expense item, fill in all of the fields marked with a red asterisk
- 4. In the **Business Justification** field, you can add information for extenuating circumstances but are not required to complete this for all items (i.e. if you ordered an Uber to and from a conference event, you would explain this here)
- 5. Upload receipts that contain your **name** and the **last 4 digits of your credit card**. If the last 4 digits are not shown, you must upload a pdf of the credit card transaction or an image of your physical credit card (redact all but the last 4 digits of your credit card number).





Example: Train

Details Itemizations		Receipt
B Allocate	* Required field	1 / 3 - + 5
xpense Type *		20234,319 PM Mail: Book, bilone: Chalonik
Train	× •	Ourdook Eatermall Americals, efficient and Receipt for Your 09/27/2024 Trip - JULETTE BROOM
ype of Travel/Reimbursement *	Country Code 3	[EXECUTED PROTOCOL TENSOR AND INTERPRETATION OF THE ORIGINAL TO THE ORIGINAL TO THE ORIGINAL THE DESCRIPTION OF THE ORIGINAL THE ORIGIN
1. Domestic	•	To stock, Justin Charles and group renomation upon acti- (i) Interference (17 kg) (ii) Why Julies 20000024(0550706,plf)
ransaction Date *	Class of Service *	
08/02/2024 É	Coach	the don't often get enail from etidebiliteretrisk.com. Leans aday this is copposed. SALES RECEIPT
Jusiness Justification	Vendor Name	Purchassed: 00/02/2024 13:15 AM PT Hestilver ID (Thank you for your purchase, I. Retain this receipt for your records, go (you have been been been been been been been be
	AMTRAK	Show the QR code on the attached efficient for the conductor or use the Amtrak app.
estination City *	Payment Type *	Reservation Number - 4A33B2 Philadelphia, PA - William H Gray III 30th St. Sta. to Baltimore, MD - Penn Station (Round-Trip)
Baltimore, Maryland X		AUGUST 2, 2024 Billing Information
•	Cash/Personal Credit Card	American Express ending in 1036 (Purchase) Authorization Code 204012
mount *	Currency *	Purchase Summary - Ticket Number 2150601068548
35.00	US, Dollar (USD) X 🗸	TRAIN 171: Philadelphia, PA - William H Gray III 30th St. Sta. t Baltimore, MD - Penn Station (Round-Trip) Depart 239 PM, Fridey, September 27, 2024
	Lawson AU-UPHS COA 🔞	E COACH SEAT
Personal Expense (do not reimburse)		Ticket Terms & Conditions VLD DATE TRAIN TICKETED, NO SHOW, PORFET VALUE INC. (Included allow counted ALLA (ALLACOMOTO MERCELLA YARK) YARKI YAYAYAA (ALLACOMOTO MERCELLA YARKI YAYAYA (ALLACOMOTO MERCELLA YAYAYA (ALLAC

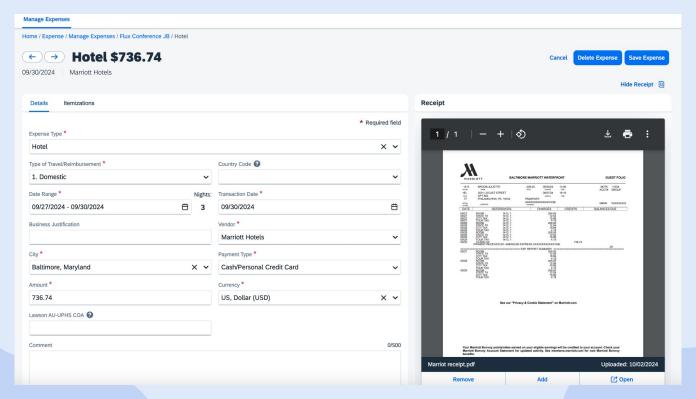
Note: Make sure to indicate the **Class of Service** as *Coach*. Penn will not cover tickets above coach.



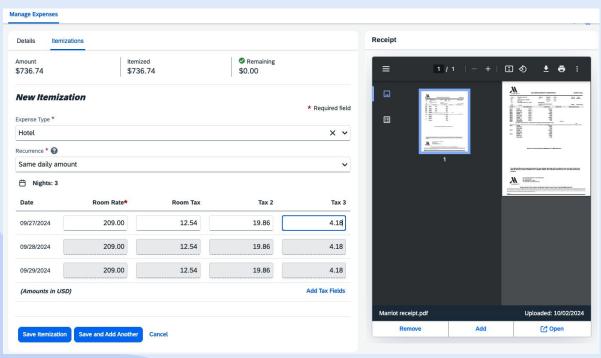




Example: Hotel

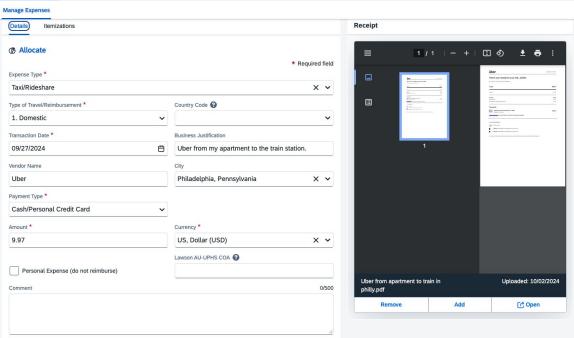


Example: Hotel cont.



Note: In the Itemizations tab, make sure to add in the daily Room Rate and various taxes. You can select these costs as Same daily amount or differentiate them by day.





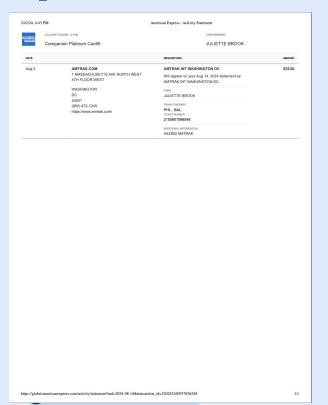
Note: Here I included a Business Justification to explain where the Uber was going to.







Example: Credit Card Transaction



Note: In the event that a receipt does not contain your name and/or the last 4 digits of your credit card number, you need to provide a credit card transaction showing the purchase. This should be a **pdf** not a screenshot. I downloaded this from the Amex website (it may not be possible to generate a pdf from the credit card apps but it probably depends on the card). The transaction pdf should show your name, the purchase, and the last 4 digits of your credit card number (redact all other digits).

STEP 3: Travel allowance

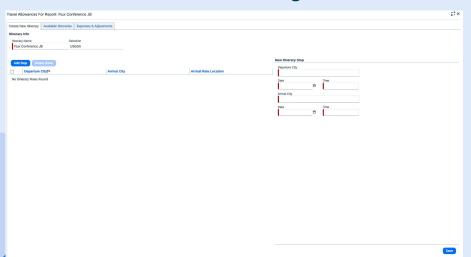
- 1. In order to receive the per diem money, you need to set up your Travel Allowance
- 2. Under Travel Allowance, click Manage Travel Allowance
- 3. Go to **Create New Itinerary** and enter in the information for your arrival and departure to/from the conference according to your transportation receipt. Make sure to save your information.
- 4. Under **Available Itineraries**, you should see the correct departure and arrival information.
- 5. Under Expenses & Adjustments, select the meals that were provided by either the conference or the lab (i.e. lab dinner). This will reduce your daily per diem amount.
- 6. Note: The per diem amount is set according to when you arrived/departed from the conference. Therefore, if you arrived at 5 pm on the first day, you cannot quality for a per diem reimbursement that includes breakfast or lunch because those meals took place before you arrived. You must select that those meals were **provided** in order to reduce your per diem amount.



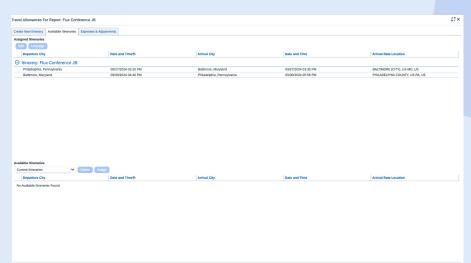


Example: Travel Allowance

X Create a new itinerary



Available itineraries







Example: Travel allowance cont.

Expenses & adjustments

how dates from a to Date/Lc	cation†±	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
09/27/2		V	V	E	\$18.75
09/28/2 Baltimo	024 re, Maryland		Б	В	\$69.00
	024 re, Maryland	E	6	V	\$38.00
09/30/2 Baltimo	024 re, Maryland		В	V	\$20.75

Note: I selected that breakfast & lunch were provided on the first day because I arrived after those meals took place. I also selected lab dinner on 9/29. Lastly, I selected that dinner was provided on the last day because I left before that meal took place.

STEP 4: Review

- 1. Once you've entered all of the items, send an email to 10Admin-Fin@PennMedicine.upenn.edu or patrick.doyle@pennmedicine.upenn.edu to have it reviewed.
- 2. After making any necessary changes, you can submit it.

