

PRESIDIO®

# EMPLOYEE EXPENSE GUIDELINES - 2025

Last Reviewed Date: March 14, 2025

## Introduction

### Purpose of the Employee Expense Guidelines:

The purpose of the Employee Expense Guidelines is to establish clear and consistent standards for the reimbursement of business-related expenses incurred by employees and to outline the process for availing the benefits provided by Presidio India.

### Guidelines Applicability:

This guidelines is applicable to all full-time employees of Presidio India, including those working in any department, function, or location within the organization. It encompasses all employees who have been hired on a full-time basis under the terms and conditions outlined in their employment agreements with Presidio India.

This guidelines is not applicable for Contractors, interns, consultants, and part-time employees unless explicitly stated. Separate guidelines may apply to these categories of workers, as specified by their respective agreements or organizational guidelines.

## HDFC Flexi Card

The HDFC Flexi card is a prepaid expense card through which the flexi pay “food card” component, rewards & recognition bonus, birthday load and fuel reimbursement for office commute are loaded on a monthly basis based on the applicability. ATM withdrawals are not allowed in the HDFC Flexi card. It can be used for online transactions and at the Point of Sale (POS) machines. All the new joiners will receive their physical HDFC Happay card within 25 to 30 days from date of joining.



### HDFC Bank Prepaid Expense Card Applications:

- **IOS Download Link:** [HDFC Bank Prepaid Expense Card](#)
- **Android Download Link:** [HDFC Bank Prepaid Expense Card](#)

### HDFC Flexi Card Load Amounts:

- **Food Wallet:** Up to INR 2,200/- will be loaded per month in the Food wallet for employees who have opted for Food Card under Flex Allowance category in Tanqaa.
- **R & R Wallet:**
  - **A & B Award Winners:** INR 4,999/-
  - **Spot Award Winners:** INR 2,500/-
  - **Birthday Load:** INR 500/- will be processed on the birthday month
- **Fuel Wallet:** Up to INR 5,000/- per month for office commute based on the approved bill value which is uploaded in the HAPPAY portal.

### HDFC Flexi Card Payout Dates:

- **Food Wallet:** Salary pay-out date. i.e. last working day of the month
- **Spot Awards:** 8th of every month
- **A & B Awards:** Next working day after the announcement of the award winners
- **Birthday Load:** 8th of the birthday month

## HDFC Flexi Card - KYC Completion Process:

It is mandatory for all employees to complete the full KYC process to accumulate more than INR 10,000/- across all wallets combined. Follow the process outlined below to complete the full KYC procedure:

- Login to the HDFC Flexi Card Portal: [HDFC Flexi Login](#)
- Go to the “**Profile**” page
- Open the “**KYC**” page under the “**Expense Details**” section
- Select either one of the below mentioned KYC options based on the applicability:
  - **Quick KYC:** Applicable for employees with existing or prior relationship with HDFC.
  - **Physical KYC:** Applicable for employees with no existing or no prior relationship with HDFC.

### **Quick KYC - For employees with Any Existing or Prior Relationship with HDFC:**

Employees with any existing or prior relationship with HDFC can complete the full KYC process by using the “**Quick KYC**” option.

- Validate your mobile number using OTP
- Enter your PAN number

**Note:** Mobile number registered in the current profile should be the same as the mobile number provided in the HDFC Bank product / account.

### **Physical KYC - Employees with No Existing or No Prior Relationship with HDFC:**

Employees with no existing or no prior relationship with HDFC can complete the full KYC process by using the “**Physical KYC**” option. Upload and enter the following details and documents:

- Upload your Photo
- Enter your Date of Birth
- Upload your ID Proof (PAN Card Only)
- Upload your Address Proof (Driving License / Aadhar Card / Voter ID)

**KYC Documents Upload Guidelines:**

- Both the ID Proof and Address Proof must be self attested and also be attested (OSV - Original Seen & Verified) by an approved HDFC authority.
- In case if Aadhar copy is being used as Proof of Address, then the first 8-digits of the Aadhar number should be masked (hidden).
- Both the front and backside of the document to be included for both ID Proof and Address Proof.

**KYC Documents (OSV - Original Seen & Verified) Attestation Process:**

- Employees must share the self attested ID Proof (PAN Card) and Address Proof (Driving License / Aadhar Card / Voter ID) to Presidio India, Chennai Office .
- The HR team will get the documents (OSV - Original Seen & Verified)attested by the HDFC authorities
- The HR Team will then share self attested documents back to the employees
- Employees must then upload the scanned copies of those documents to the HAPAY KYC portal

**Key Points regarding HDFC Flexi Card:**

- ATM withdrawals are not permitted. However, the card can be used for online transactions and at the Point of Sale (POS) machines.
- As per the HDFC Flexi Card's restrictions, the combined wallet balance cannot exceed INR 2,00,000/-
- If full KYC is not completed, the total wallet balance (across all wallets) cannot exceed INR 10,000/-
- Upon exit, the employee's HDFC Flexi Card account will be deactivated 90 days after the exit date. If the wallet balance is not fully utilized, the remaining amount will be forfeited and will become unusable.

**Please reach out to the HR team if you have any queries related to  
HDFC Flexi Card.**

## Concur - Expense Reimbursement

Concur is Presidio's official Reimbursement tool where employees can claim Regular and Business expenses. The login to Concur is done by feeding your Presidio credentials via Azure.



**Concur URL:** <https://www.concursolutions.com/home.asp>

### Regular Expenses & Limits:

- **Commute:** INR 5,000/- per Month - Cab/Taxi, Auto, Metro, Bus
- **Internet:**
  - Monthly: INR 2,000/- per Month
  - Quarterly: INR 6,000/- per Quarter
  - Bi-Annual: INR 12,000/- (Half-Yearly)
- **Router Installation Charges:** INR 3,000/-  
(One time Claim: Only for New Joiners to be claimed within 90 days of Joining)
- **Cellphone:** INR 1,000/- per Month (Applicable only for official purpose)
- **Subscriptions / Dues:** INR 3,500/- per Month (Only for Approved Platforms)
- **Certification:** INR 25,000/- per Quarter
- **Office Supplies (Laptop Waterproof Cover):** INR 2,000/-  
(One time Claim: Only for New Joiners to be claimed within 90 days of Joining)
- **Individual Meals:** INR 220 per person per day
- Courier Charges
- **Miscellaneous - On Demand:** Any Project related expenses which are not a regular claim

### Business Expenses & Limits:

- Taxi/Cab Services
- Employee Morale Meals: INR 2,000/- Per Person Per Quarter
- Visa Charges

**Note:** Visa Charges and Employee Morale Meals, requires approval mail from practice heads.

## Mandatory Practices on Claims:

1. All Expenses should be claimed within 60 days from the Date of Invoice.
2. All Invoices should be in the name of the Employee.
3. Expenses Date and Amount must be the same as mentioned in the Invoice.
4. Reimbursements on the Concur tool follows calendar year basis

## Mandatory practices for Foreign Currencies:

**Screenshot of Bank Statement along with the Invoice must be attached.**

- If the Invoice is in USD - The claim Amount (USD) must match the Invoice Amount and Amount in INR must match the bank statement

Amount *	Currency *
23.50	US, Dollar (USD)
Exchange Rate *	Reverse Rate
1 USD = 83.0340478462	INR
Amount in INR *	
1,951.30	

## Subscription / Dues:

Employees can reimburse subscription only from Presidio approved platforms such as follows:

1. A Cloud Guru
2. Coursera
3. Frontend Masters
4. Grammarly
5. KodeKloud
6. O'Reilly
7. Pluralsight
8. Udemy
9. Whizlabs
10. GitHub Co-Pilot
11. ChatGPT Plus
12. Harvard Business Review
13. JetBrains IntelliJ
14. ClaudeAI

**Note:** Subscriptions are to be claimed only on a monthly basis.

## Internet & Cell Phone:

**Annual Internet Reimbursement Amount:** INR 24,000/-

**Annual Cell Phone Amount:** INR 12,000/- (Applicable only for official purpose)

### Note:

- Annual reimbursements are not applicable.
- DTH and Other charges will not be reimbursed along with Internet and Cell Phone Invoices.
- Payment receipts will not be considered for reimbursements. Only tax invoices will be considered.
- Internet and Cell Phone - Quarterly & Half-Yearly claims will be paid on a pro rata basis.
  - **Eg:** Quarterly claim of INR 3,000/- for the Month April will be paid in three Equal Instalments:
    - April: INR 1,000/-
    - May: INR 1,000/-
    - June: INR 1,000/-
- If an employee claims a particular benefit but decides to leave the organization before the expiry of the timespan of the benefit, the claim will be deducted while disbursing the Full & Final settlement on a pro rata basis

## Commute – Invoice Best practices:

- Only the Booking ID number should be mentioned while raising the claim, for instance
- OLA – CRN\*\*\*\*\*7\*\* (13-digit number)
- RedTaxi – CR\*\*\*\*\*5\*\*\*\* (14-digit number)
- Rapido – RD\*\*\*\*\*44\*\*\*\*\*33\*\*\*\*\* (19-digit number)
- Uber – Vehicle registration number

**Note: If other invoice number are mentioned your claim will be rejected.**

- Only valid commute bills will be accepted. Invalid/Unauthorized Vendor company bills will not be accepted
- From & To Location should be mandatorily mentioned in the invoice

## Request and Approval in Concur:

Exceptional cases on claiming the expenses require Approval Mail followed by a “Request” to be raised in Concur – once the “Request” has been approved it can be converted to “Expenses” for reimbursement.

## Raising a “Request” (Exceptional Cases):

1. In cases where the expense is likely to exceed the stipulated limit, a **Request** will have to be raised prior to incurring the expense.
2. An email seeking the approval of the Practice Heads must be shared. Kindly ensure that Country Head, India & the Finance team are marked in CC.
3. The Approval mail from the Manager / Lead must be attached along with the Invoice. The following attachments should form part of the expense report proofs - Approval Mail, Invoice / Receipt
4. This does not apply to Internet / Cellphone expenses as it is mandatory to stay within the prescribed limits
5. If a Request is raised after incurring the expense, the claim will be limited to the prescribed limit.

## Itemization of Expenses:

Any expenses more than approved limit must be itemized as Company Paid (reimbursable) and Personal expenses (cannot be reimbursed).

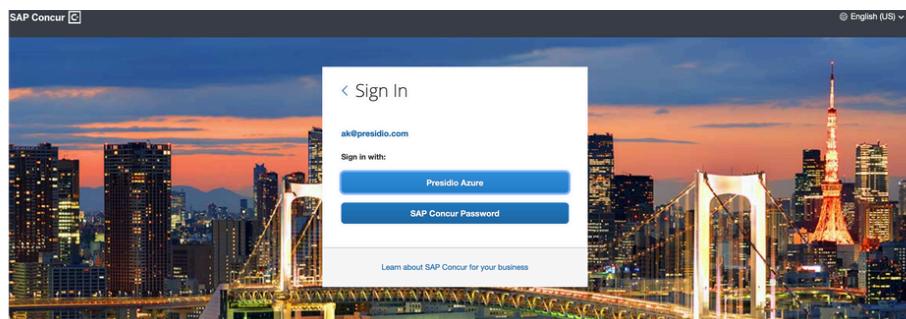
Eg: The monthly limit for Internet is INR 2000/- and we have incurred INR 2500/-, in this case, we need to itemize the expenses as below:

- Company Paid: INR 2,000/-
- Personal Expenses: INR 500/-

## Concur Job Aid:

**Concur Login:** <https://www.concursolutions.com/home.asp>

- Log in to Concur using Presidio Work Email ID
- Sign in with - Presidio Azure



Click Expense ----> Create New Report Report

A screenshot of the SAP Concur 'Manage Expenses' page. The top navigation bar shows 'Expense' and 'Expense'. Below it, there are tabs for 'Manage Expenses' (which is selected) and 'Process Reports'. The main area is titled 'Manage Expenses' and 'Report Library'. It displays a placeholder icon for a report and a red box highlights the 'Create New Report' button. A dropdown menu 'View:' is set to 'Active Reports'. The status bar at the bottom shows 'No Reports'.

To add Expenses Click on the Categories and Sub-category based on the claim

New Expense

Details
Itemizations

**Allocate**

Expense Type **\*** Required field

Mode of Transport **\***

Business Purpose/Description

City of Purchase

Amount **\***

Bill No.

Company (1) Territory (2)

Department (3)

Receipt

Add Receipt ▲

Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

- Fill all the Mandatory (\*) fields
- Add the Invoice/Receipt
- Save Expense / Save and Add Another

Company (1) Territory (2)

Department (3)

Comment

**Save Expense** **Save and Add Another** **Cancel**

Once you add all the expenses - Ensure to **Submit Report**

### Important notes to upload proofs:

1. All the Invoice should be in PDF/PNG/JPG/JPEG/TIF format
2. Maximum size per invoice should be 5 MB
3. Password protected files should not be uploaded.

You can also Download SAP Concur App from your iOS / Android to add your expenses.



### Key Points:

1. Screenshots CANNOT be attached
2. Online/UPI transactions are NOT accepted
3. Handwritten receipts are NOT accepted
4. Payment Receipts are NOT accepted
5. Kindly ensure the reports are submitted on a weekly basis.
6. Any exceptional case that does not fulfil the criteria mentioned above will require an approval from the head of operations.
7. It will take 10-15 days from "Sent for Payment" status or "Process Payment" status for the reimbursement amount to process, provided if you submit it on weekly basis.

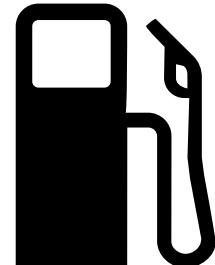
### Note:

1. Payment dates may vary based on holidays / week offs
2. Kindly go through the video recording of Concur sessions placed in the SharePoint

*Please Reach out to the Finance team in case of any clarifications regarding Concur!*

## Petrol Reimbursement for Office Commute

Every Presidio India employee is eligible for Petrol Reimbursement for Office Commute. Employees are given the option to choose one of the following benefits for Office Commute - Cab / Auto bill reimbursement via Concur, Petrol Reimbursement via HDFC Flexi Card, or Office Shuttle service. The Petrol Reimbursement amount is based on the petrol bills uploaded to the HDFC Bank Prepaid Expense portal, with a maximum cap of INR 5,000/- per month. The Petrol reimbursement amount will be processed only to your HDFC Flexi Card fuel wallet.



### Petrol Reimbursement Eligibility:

The Petrol Reimbursement for Office Commute is applicable only to employees who have worked from the office for at least 12 days in the month. Work-from-home exemption approvals are not considered for Petrol Reimbursement.

### Process:

- Employees must register their vehicles via Janet Point by sharing the vehicle details and relevant vehicle documents.  
**Note:** This is one time activity.
- Employees must declare their Commute reimbursement preference via Janet Point during the last 5 working days of the previous Quarter
- Employees who opted for Petrol Reimbursement will have to upload their bill to the HAPPAY portal.
- Once the bills are validated and approved by the Finance team the amount will be processed to your HAPPAY fuel wallet on the 10th of every month. (**Note:** Payment dates may vary in case of holidays)

### Commute Declaration in Janet Point:

Employees must choose one of the following options:

- Commute Reimbursement Via Concur
- Petrol Reimbursement
- Office Shuttle Service

Employees Choosing “**Petrol Reimbursement**” must mandatory register at least one vehicle in Janet Point. The following vehicle details are to be submitted in Janet Point:

- Vehicle Type: Two Wheeler / Four Wheeler
- Vehicle Owner Name (Employee should be the vehicle's owner)
- Vehicle Number
- RC Book document Upload (PDF Format)

### **Mandatory Checkpoints for Vehicle Registration in Janet Point:**

- Vehicles Registered in employee's name will only be accepted
- A maximum of only two vehicles can be registered



### **Mandatory Checkpoints for the Petrol Bills:**

- Petrol Bills must have the vehicle number registered in Janet Point.
- The bill must include a GST number.
- Only computer-generated bills are accepted; handwritten bills will not be accepted.
- Fuel Bills for the month must be uploaded to the HAPPAY portal on / before the last date of that month.



### **Mandatory Checkpoints for Commute declaration in Janet Point:**

- Employees opting for “Petrol Reimbursement” must mandatorily register at least one vehicle.
- Commute Preference can be declared in Janet Point only during the last five working days of the previous quarter.
- If an employee misses filling out the commute declaration in the last five working days of the previous quarter, they will be eligible only for “Commute Reimbursement via Concur” for the entire upcoming quarter.
- Commute Preference cannot be changed in between the quarter.

## 1st Month Reimbursement Limits for New Joiners:

The eligibility criteria for claiming fuel reimbursement is working from the office for 12 days in a month are relaxed for the 1st month for the new joiners, and the criteria are listed below:

- Less than 5 Days of Work from Office in a Month: INR 2,000/-
- 5 to 10 Days of Work from Office in a Month: INR 3,000/-
- More than 10 Days of Work from Office in a Month: INR 5,000/-

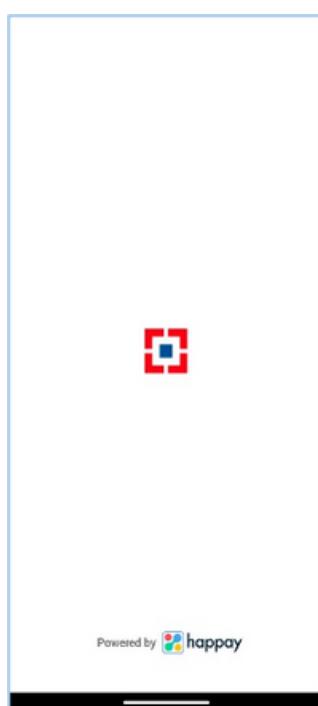
## Surcharge:

Please note that a surcharge will be levied on every transaction when using the HAPPAY Card at fuel stations. The surcharge will range between 1% and 5%, with the average surcharge being approximately 1.18% of the transaction value.

**Note:** Surcharges will not be reimbursed.

## Steps to upload bills in HDFC Bank Prepaid Expense App:

### Step 1: Open HDFC Prepaid Expenses Mobile Application



**Step 2:** Click on “+” Icon (i.e. Add New/Create New Expenses)



**Step 3:** Enter the required details (i.e., Date, Amount and Description if any) and make sure the wallet is “Fuel” and Expenses type is “Cash”

Click here to attach Invoice

Select "Fuel" wallet

Select "Cash" as Expenses type

After entering the click ✓ to save

*For reimbursement related queries please reach out to the Finance team and for attendance and HAPPAY related queries please reach out to the HR team.*

## Certification Reimbursement and Bonus

Every employee is eligible for Certification Reimbursement and Certification bonus based on pre defined criteria and approvals. Employee can claim reimbursement up to INR 25,000/- based on approvals and successful completion of the certification. Certification will be considered for Bonus and Reimbursement only if it is uploaded to the Insight application.

**Insight Application Link:** <https://insight.app.presidio.com>

**Note:**

1. Purchase of Vouchers / Books are not considered for reimbursement.
2. Certifications to be completed and claimed within 60 days from the Invoice date.
3. Kindly refer to the [Certification Reimbursement & Certification Bonus](#) SharePoint page to know about the approved certifications.

### Certification Bonus Amounts:

- Associate Level Certifications - INR 5,000/-
- Professional Level Certifications - INR 10,000/-
- Speciality Level Certifications - INR 10,000/-

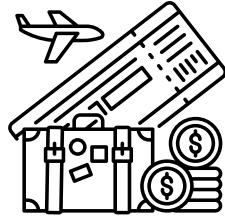
**(Taxes will be applicable for the Certification Bonus as per norms on year-to-date basis)**

### Certification Bonus Payout Dates:

Quarter	Period	Bonus Pay-Out Date
Q1	January 01, 2025 to March 31, 2025	April 08, 2025
Q2	April 01, 2025 to June 30, 2025	July 08, 2025
Q3	July 01, 2025 to September 30, 2025	October 08, 2025
Q4	October 01, 2025 to December 31, 2025	January 08, 2026

## Travel / Vacation Benefit

Employees with more than 1 year of work experience at Presidio Solutions Private Limited can avail the travel / vacation benefits up to INR 25,000/- per financial year (April to March) spent on vacation through Tanqaa. The reimbursement tab will be enabled in Tanqaa the 1st to the 10th of every month, allowing employees to upload their bills. Reimbursement will be processed along with the monthly salary.



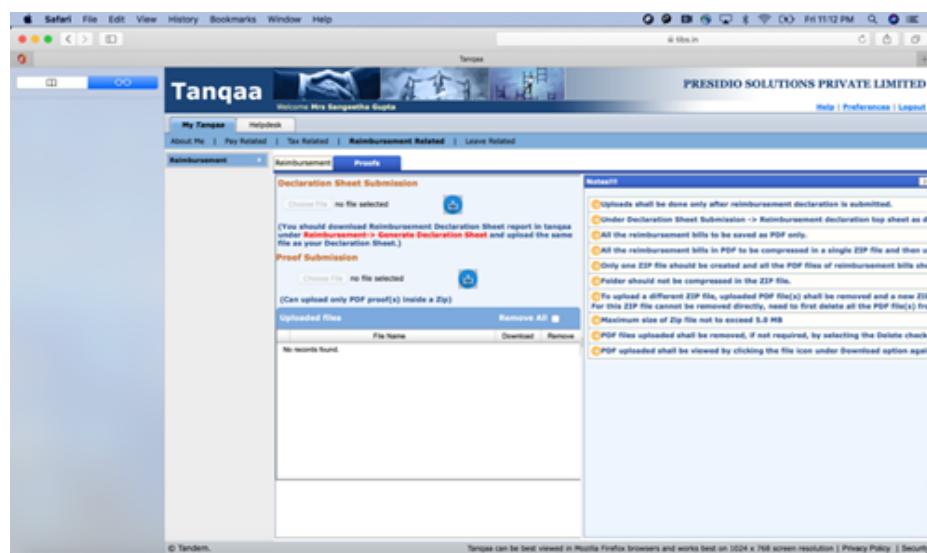
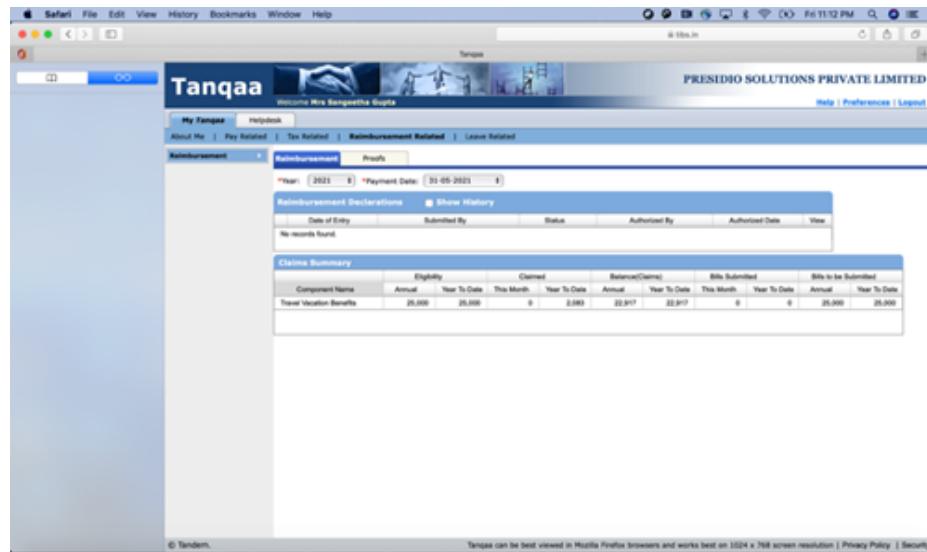
### Tanqaa TVB Module:

- View claim summary
- View the guidelines for submitting Travel Vacation Benefits
- Submit "Travel Vacation Benefits" claim online. As soon as you log in, follow the following path to reach the reimbursement screen-

**My Tanqaa** (first level horizontal menu item) >> **Reimbursement Related** (fourth level horizontal menu item) >> **Reimbursement** (first vertical left menu item).

Choose '**Year**' and '**Payment Date**' and click on '**Add new declaration**'. Under '**Bills for the Month**' -> Travel Vacation Benefits, click on plus (+) icon to add a row and key in bill details (Receipt number, Date and Amount). Add additional rows in case of multiple bills.

Scroll down and key in comments related to the claim in the 'comments window' and finally click on '**Submit**'.



## Mandatory Checkpoints:

- Employees can avail the travel vacation benefits upon completion of 1 year with Presidio Solutions Private Limited, and the bills need to be added to Tanqaa before the end of the financial year (1st April to 10th March)
- The reimbursement tab will be enabled in Tanqaa from the 1st to the 10th of every month, allowing employees to upload their bills
- Considering the Tanqaa TVB tab is enabled only till the 10th of every month, travel post March 10th is not accepted
- Maximum Reimbursement amount is INR 25,000/- per year
- Travel should be outside office location
- All invoices should be in employee's name only
- GST details should be mentioned in the bills / receipts
- As per government norms, only INR bills will be accepted
- Employees can apply for TVB only post travel
- Travel bills or hotel bills for multiple locations or places are acceptable only if the travel occurs on consecutive days

## Acceptable Bills:

- Travel Tickets
- Hotel and Lodging Bills



## Acceptable Modes of Travel:

- Air Travel (Invoice and Boarding Pass of the employee is Required)
- Train Travel
- Bus Travel
- Cruise Travel

**Note:** The bills should be in employee's name and should be one of the Passengers.

### Invoices which cannot be claimed:

- Employee is a Passenger, but the invoice is not in the employee's name
- Invoice is in the employee's name, but the employee is not a Passenger
- Food Bills
- Cars / Other vehicles for Hire
- Package Bills without Itinerary

### Package Bills:

Package Bill are accepted. But the package bill must have the Itinerary of Travel and Stay.

***Please Reach out to the HR team in case of any clarifications!***

## Per Diem Reimbursement

Reimbursable only for Business Travel within India

- Employees travelling to other locations within India for any business related purpose are eligible for a per-diem of **INR 1,300/-**
- Employees can also claim their business travel expenses in Concur under the “**Taxi / Car**” expenses category.



### Approvals:

It is mandatory for employees to get approvals from the respective manager and the practice head.

***Please Reach out to the Finance team in case of any clarifications!***