**Dear PennDesign Students,**

PennDesign requires all students who are seeking reimbursements for departmental *prior-approved* University-related travel and non-travel expenses to submit their requests through the University’s new **Travel Expense Management (TEM)** system using the **Concur Expense Report**.

In preparation for submitting expenses through the TEM system, we are providing a “starter-kit” to be used to access the **Concur Expense Report** and to highlight some of the important processes involved in creating a report. You will need your Pennkey ID and password.After you have access to the TEM system, we encourage you to refer to the FAQs, training manuals, and other available **TEM Support** options found at the end this document.

**The Concur Expense Report TAB will be ADDED within 48-72 hours after completing the starter-kit. Until then, you cannot submit expenses for reimbursement. The University will direct deposit your reimbursement into your bank account. If you do not have direct deposit, please enroll on-line here**

[**Enroll in or Update Direct Deposit  **](https://medley.isc-seo.upenn.edu/uatPenn/jsp/fast.do?fastStart=directdep)

***\*\*\*DIRECT DEPOSIT FOR STUDENTS THAT DO NOT HAVE A SOCIAL SECURITY NUMBER\*\*\****

This is not an exclusive list of banking options.
Commerce Bank, Citizens Bank, PNC Bank, Student Federal Credit Union:

Present the following documents in place of a SSN:

* A valid passport
* A valid Penn ID

Be sure to contact a representative of the bank for the most up to date information on opening an account. For more information on banking visit the [Financial Matters](http://global.upenn.edu/isss/finances) section of our site.

**STARTER -KIT**

**Step #1 – Set-Up a Profile in Concur**

All students have a profile already created in Concur and can book *personal* travel arrangements. For departmental *prior-approved* University-related travel and non-travel expenses you must update your profile by following the PDF instructions; <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 **Chris Cataldo**.

**Value Search**

Search for Allowable values for
**Please Enter Your Budget Administrator/Approver**



Cancel

|  |  |
| --- | --- |
| Please Enter Your Budget Administrator/Approver [Required] |  |

**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 – The Receipt Store**

The University’s financial policies still 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.
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>

**Step #4 – 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 in your department with *final* approval from PennDesign Finance. As is current practice, *all travel-related Concur Expense Reports will be subject to an additional approval from your Chairman.*

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>

**TEM SUPPORT**

1. **FAQs**

<http://cms.business-services.upenn.edu/penntravel/about/faqs-and-helpful-information/51-expense-faqs.html>

1. **Training Manuals (PDF or Video Format)**

<http://cms.business-services.upenn.edu/penntravel/training-manuals.html>

### ****TEM Hotline****

215-746-4357 or from on-campus phone dial **6-HELP** <http://TEMSupport.finance.upenn.edu>

1. **PennDesign Finance**

Christine Williams creid@design.upenn.edu or Amanda Wood amanwood@design.upenn.edu

More information can be found on the TEM website at [www.upenn.edu/penntravel](http://www.upenn.edu/penntravel)