Request a Travel Advance

**Step One: Create a new Expense Report**

*Note: Do not combine with any other expense reimbursement entries*

1. Log into Concur
2. Click on the Expense tab, and select “+ Create New Report”
3. The Report Header will appear

**Step Two: Fill out the Report Header**

Fill in each block (those with red left borders are required fields)
1. **Type of Travel** – Select one. If you choose International, the Country Code and the Trip Begin Date and Trip End Date blocks are also required.

2. **Country Code** – Leave blank unless you choose ‘International’ as the type of travel.

3. **Report Name** –
   - Recommended format: Travel Advance Austin TX 3-14-19.
   - Another option includes conference name: Travel Advance SCTEM 3-14-19.
   - No need to include your name, since you are doing this under your own account.

4. **Report Date** – NO ENTRY – defaults to date expense report was created.

5. **Policy** – **MOST IMPORTANT STEP:** You must select “US Travel Advance Policy” from the drop down box. Use this for domestic, local and international travel. (If you hit the Next button at the bottom of the screen without choosing the US Travel Advance Policy, the expense type “Travel Advance” will not be available for your use. You will need to delete the report and start again.)

6. **Business Justification** – text field – Enter sufficient explanation to satisfy the approvers.


8. The next 5 fields fill in automatically based on your PennKey.

9. **Notes to Approver** – This field **MUST** be completed with an explanation of the reason that a Travel Advance is necessary prior to incurring the expense. It is a required entry for all Travel Advance Requests.

10. At the bottom right of the screen, select the Next button.
Step Three: Input details of the Travel Advance Request

1. Select expense type Travel Advance from the right side of the screen.

2. A Travel Advance Request contains only one line item. Do not enter separate line items for the different items that add up to the full amount.

- Transaction Date – Chose today’s date.
- Trip Beginning and Trip End date – Dates of your trip.
- Amount – Enter the entire dollar amount you are requesting.
- Comment – Can be used to provide detailed information.

3. The end result will be:
4. There are no receipts that accompany a Travel Advance request. However, if there are any additional documents you need to attach per your business office request, scan them and place them on your computer. Use the Receipts tab at the top of the expense report to attach these documents. An example of such a document: an approved Conference Request Form signed by a supervisor.

5. **Save** and **Submit Report**

**Additional Information**

1. The Travel Advance Request will route to your approvers.

2. Once the report has been approved and processed, reimbursement will be sent directly to the bank account shown in your Concur profile at the time the report was submitted (Profile>Profile Settings>Bank Information). If you need additional information on managing bank information **please see additional instructions here**.

3. If rejected, you will receive an email stating that your request has been rejected. To see the reason for the rejection, log into Concur, Expense Tab, and look for a box with a red top border under Active Reports. The explanation will appear directly under the dollar amount in the box.

**Note:** Once you return from your trip you will need to reconcile your Travel advance – please refer to the instructional guide [here](#) for further instructions.