Request a Travel Advance

**Step One: Begin 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 is also required (use the drop down box).

2. **Report Name** –
   - Recommended format: Travel Advance Austin TX 3-14-12
   - Another option includes conference name: Travel Advance SCTEM 5-22-12
   - No need to include your name, since you are doing this under your own account.

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

4. **MOST IMPORTANT STEP:** Policy – 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.)

5. **Business Justification** – text field – enter sufficient explanation to satisfy the approvers

6. **Report Key** – NO ENTRY – fills in automatically upon submittal of expense report

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

8. **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 required entry for all Travel Advance Requests.

9. At the bottom of the screen, select Next >>

**Step Two: Input details of the Travel Advance Request**

1. Select New Expense button.
2. Select expense type **Travel Advance** from the right side of the screen

3. The entire amount you are requesting should be entered on this one line. 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. The comment field can be used to provide detailed information. Fill out the required fields. 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, 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. **IMPORTANT**: If you are creating more than one Travel Advance request in one day, each request must be for different amounts. The system will not properly process both requests. To enter a request of $400 for the men’s team and $400 for the women’s team, submit the requests on different days (work days, not weekends).
2. The Travel Advance Request will route to your approvers
3. Once approved, the funds will be direct deposited to your bank account or paycard
4. 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.