Know Before You Go

Welcome to the University Travel & Expense Reimbursement (T&E) guidelines. By booking and paying for travel using Penn’s preferred payment methods and vendors, you are helping to ensure that Penn’s resources are spent prudently and that we leverage all available savings.

1. Booking guidelines – Access preferred travel partners through Concur online or Penn’s preferred Travel Management Company, World Travel Inc. at 888-641-9112. Charge airline expense directly to your department or funding source to eliminate paperwork and hassles by using the “direct bill” option. This is only available for airfare.

2. Payment Guidelines – The Penn Travel Card, a Bank of America Visa, is the best way to pay expenses while traveling. Transactions feed directly into Concur for inclusion on an expense report, and upon submittal and approval, Penn will send payment directly to the credit card on your behalf. Eliminates use of personal funds for university travel.

3. Reimbursement Guidelines – Use Concur to submit your expense report. Attach all required detailed receipts and documentation. Upon submittal and approval, payment for out of pocket expenses will be sent to your direct deposit bank account. If you are a Penn Travel Card user, upon approval of your expense report, payment will be made directly to the credit card company on your behalf.

For up-to-date information on policies and procedures, and T&E related news, please visit the Penn Travel website at www.upenn.edu/penntravel

Quick Tips

Important Tips:
- Book airfare at least 14 days in advance for the best choice of flights and fares.
- Use a World Travel agent or the Concur online booking tool to make reservations. World Travel supports both. They are there to assist you both before and during travel, 24/7, year round.
- Carry your Passport, Visa and other documentation. Do not put it in luggage.
- Keep important phone numbers handy:
  - Missed Flight or Connection (World Travel): 888-641-9112.
- Retain all receipts, either electronically or hard copy.
- Complete and submit your expense report within ten days to be reimbursed quickly.
- Use the Penn Travel Card to minimize out of pocket expenses.

International Travel

Important Tips:
- Passports are required when traveling to another country. Make sure your passport is up to date and valid. Extend your passport if it will expire within six months of your return home.
- Find out if you will need any visas to enter the country.
- If you are traveling on a federally sponsored project, the Fly American Act states that you must use a US flag carrier airline.
- Register your trip with “MyTrips”.
- Check with the U.S. State Department concerning safety warnings.
- Find out what vaccinations you will need to enter the country. There may also be medications you will need to take before, during and even after your trip.
- Check the currency exchange rates before you go.
- Know the rules of the road. Always buy basic car insurance when renting internationally.

Best Practice: Visit the Penn TEM Website, select International Travel for links and helpful information.
How Do I Book My Travel?

AIR: Use Concur on-line or book through World Travel Inc., Penn’s preferred Travel Management Company.
- All of the University discounts negotiated with preferred travel partners automatically apply.
- Out of pocket expenses are greatly reduced with airline tickets direct billed and allocated to your department or funding source.

TRAIN: Amtrak tickets can be purchased on www.amtrak.com or through Concur/World Travel.
- A credit card is required at time of reservation

RENTAL CAR: Enterprise, National, Avis, and Budget all include LDW/CDW insurance in rental rates for University related domestic travel when using Concur, World Travel, or the links on the PENN TEM website.
- Decline insurance domestically, purchase insurance internationally.
- A credit card is required at time of reservation
- Note: Completion of the Knowledge Link course "Fundamentals of Driver Safety" is required prior to renting a car for University related travel. It must be taken once every three years.

Best Practice: By using Concur on-line booking tool to book your air, hotel, and rental car, you control your own bookings and are supported by World Travel throughout your trip.

How Do I Pay for My Travel?

Most University-related travel can be managed without using personal funds.
- Airfare booked through Concur on-line or through the Penn preferred travel agency is charged to a centrally held air credit card, with allocations going every two weeks to your department funding source.
- Use the Penn Travel Card, a BOA Visa, for ground transportation, lodging and food. Upon submittal and approval of your expense report in Concur, Penn will pay the credit card on your behalf for the business related expenses.
- Personal credit card or cash are acceptable, but not a preferred method.

Upon conclusion of your trip, file your expense report in Concur to recoup any out of pocket expenses and to move the Penn Travel Card transactions through the system into payment mode.

Best Practice: Apply for the new Penn Travel Card to significantly reduce out of pocket cost.

How Do I Get Reimbursed Quickly?

Best Practice: Submit your expense report within 10 days of the conclusion of your trip or event. Receipts required for expenditures of $25 and over.
- Airlines or Rail: Ticket stub or itinerary/invoice confirmation showing travel dates and ticket cost.
  - Do not put airfare on an expense report if you did not directly pay for it with a personal credit card.
- Hotel and Car Rental: Itemized hotel or rental statement. Credit card statement is insufficient.
- Meals: Itemized meal receipt and credit card receipt if paid by credit card.

Important: All reimbursements must be submitted within 182 days (6 months) of the ending date of the trip or event. Failure to do so could result in the expense being declined for reimbursement.

Important Contact Information

Penn Preferred Travel Agency: World Travel Inc.
Phone: 888-641-9112 (24/7, 365 days a year)
Email uofppenn@worldtravelinc.com (during business hours)
afterhours@worldtravelinc.com (afterhours and weekends)

Visit Penn TEM Website: All Travel and Expense Information www.upenn.edu/penntravel

Penn Travel Services (travel@exchange.upenn.edu)
Phone: 215-898-9662
Penn Assistance with Concur Expense Reports 215-746-4357 or 6-HELP, Option 3
doffemsup@pobox.upenn.edu
Penn Travel Card Assistance
cardadm@exchange.upenn.edu