

GGEB Financials

Reimbursements, Conferences, and More

Assigning Travel and Expense Delegates

Add Coordinator as Travel Arrangers and Expense Approver

SAP Concur

Travel

Expense

App Center

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Expense Settings

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Bank Information

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Expense Approvers

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Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Bank Information

Bank Information

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Concur Mobile Registration

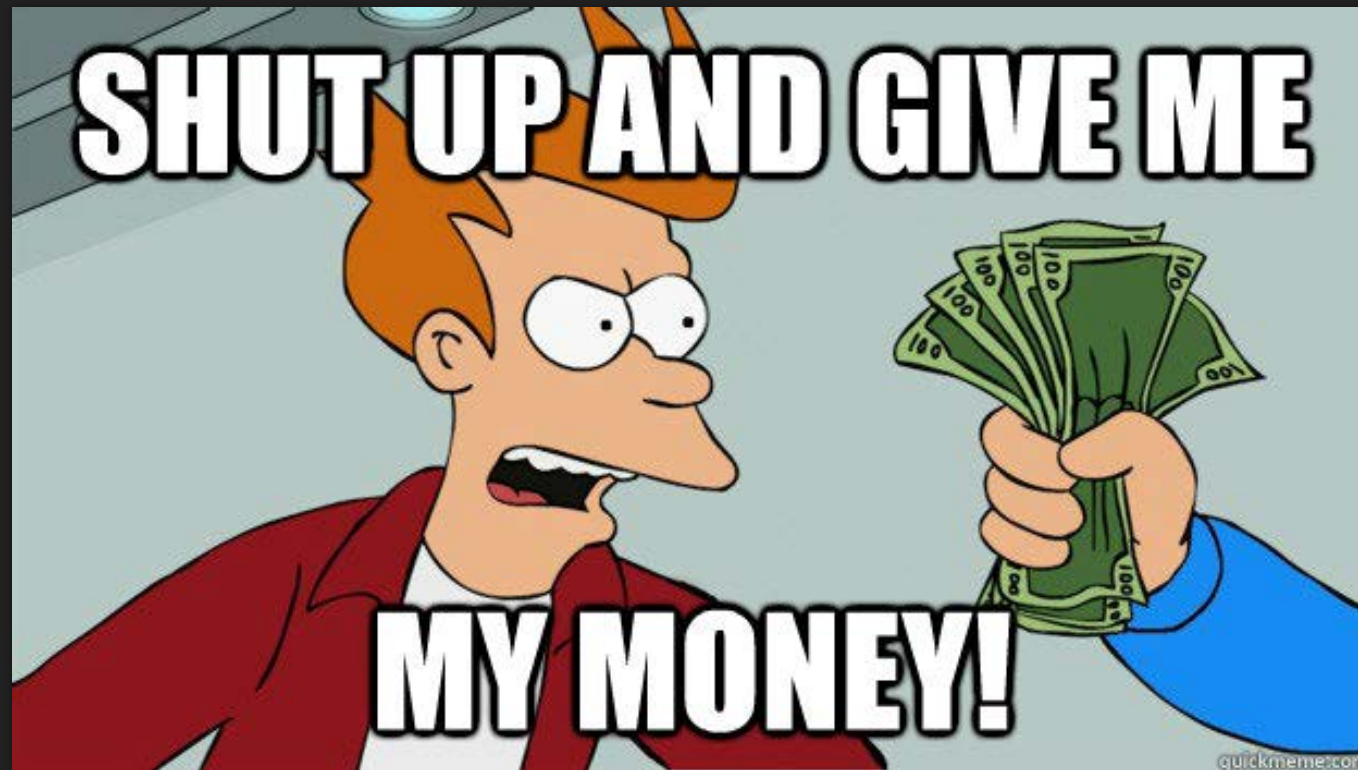
Set up access to Concur on your mobile device

Booking Travel

Send the GGEB coordinator your flight details (price, times, flight number, etc).

- The coordinator needs emailed approval for the expense from the instructor/mentor, so when you ask for approval, CC me.
- If the flight is being paid for by a grant (R01, etc), I will also need a completed and signed A21 form.
- Once I have everything, I will book the flight and send the A21/flight info to the business office for final approval.
- It is helpful if you can provide two flights in case seats fill up before I'm able to get to the request.
- For trains, follow the conference/membership procedures

Reimbursements, or...



Reimbursements

To Submit a reimbursement, you will need...

- Receipts, itemized!
- Proof of attendance (nametag, program)
- Expense Report Approval Form if not paying from a grant
- Statement of Business Connection
- A21 Form, if your advisor is paying from a grant
- Patience

All forms can be found on the Resources page of the GGEB website.



Statement of Business Connection

- When filling it out, the date given should reflect the date of travel/conference.
- Include the full name of the conference location, and dates.
- You do not need the business administrator's signature.
- You also need proof of attendance in the form of a nametag or cover/title page of program and page where your name appears.
- Attach it to the "Receipts" section

UNIVERSITY OF PENNSYLVANIA STATEMENT OF BUSINESS CONNECTION

This agreement dated this 11 day of August, 2019 by and between the University of Pennsylvania, a not-for-profit institution of higher education organized under the laws of the Commonwealth of Pennsylvania having its principal address at 3451 Walnut Street, Philadelphia, Pennsylvania 19104 (hereinafter referred to as the University), and Jiaxin Fan, whose address is 3939 Chestnut St, Apt 503, Philadelphia, PA 19104 (hereinafter referred to as Student/Trainee).

RECITALS

The University desires to obtain representation from the Student/Trainee and the Student/Trainee has agreed to provide representation and has agreed to provide the representation on the terms and conditions set forth in this Agreement.

Now, therefore, in consideration of the faithful performance of the obligations set forth herein and other good and valuable consideration the receipt and sufficiency of which are hereby acknowledged, the University and the Student/Trainee hereby agree as follows:

1. Scope of Work. The Student/Trainee will promote the business objectives of the University and/or consult with and advise the University on matters and/or perform representation relating to the following (*provide full detail of scope of assignment*) attended and presented research at the Next Generation Genomics meeting, New York, NY, from 8/12/2019 through 8/14/2019.

2. Time Devoted to Assignment. In the performance of the Representation, the amount of time devoted by the Student/Trainee on any given day will be entirely within the Student/Trainee's control, and the University will rely on the Student/Trainee to put in such number of hours as are necessary to fulfill the requirements of this Agreement.

3. Reimbursement of Expenses. Student/Trainee shall be entitled to reimbursement from the University of certain approved out-of-pocket expenses in accordance with the accountable plan reimbursement policies of the University. In this regard, any approved expenses reimbursed by the University to Student/Trainee must be for a business purpose and must be adequately substantiated. Further, any excess reimbursements must be returned to the University in accordance with the University's accountable plan policy.

Expense Report Approval Form

- Only reimbursements being paid from non-grant accounts require this.
- The advisor funding the trip should fill it out.
- Attach it to the "Receipts" section in Concur.

University of Pennsylvania-CCEB
Concur Expense Report Approval Form

This document must be scanned and uploaded into Concur as a receipt image

Project Title:
Principal Investigator:
Fund Number:
Destination:
Date(s) of Expense:
Payee / Traveler Name:
Amount of Expense:

Justification of expense /Business Purpose:

(Describe below how this expense relates to the project / account being billed. This explanation should be detailed enough so that an auditor or central administrator can understand why this expense is allowable and allocable without reading full proposal or grant award.)

A21 Form

- Only reimbursements being paid from non-grant accounts require this.
- The advisor funding the trip should fill it out.
- Attach it to the "Receipts" section in Concur.

University of Pennsylvania Expenditure Justification for Sponsored Research Projects

Project Title: Statistical Methods for Transcriptomic Profiling using RNA sequencing

Principal Investigator: Mingyao Li

Project /Grant Number: R01GM108600

Fund Number: 563388

Description of Expense: Travel to ASHG 2019

Amount of Expense: \$1,666.89 Date of Expense: 08/12/2019-08/14/2019

Explanation of Cost Allocation (i.e. how was a determination made regarding the percentage of this expense charged to the project listed above?)

The research that Jiaxin Fan presented at ASHG 2019 is 100% supported by R01GM108600.

Justification of Expense (i.e. why is this expense necessary to further the programmatic needs of the project being charged?)

Dissemination of the research finding and learning the latest development in the field are critical for PhD students. At Next Generation Genomics 2019, Jiaxin Fan presented research work supported by R01GM100860. The reimbursement includes travel expenses for her trip.

Certification of Principal Investigator I hereby certify that the expense described above is allowable, allocable to the project, and reasonable, based on the cost principles outlined in OMB Circular A21. I have authorized the allocation of the expenses as listed against

Expenses

- Entering expenses is pretty straightforward...

Expenses

- Hotels can be tricky, especially if splitting the bill with another student.
 - Students must book hotels themselves; I cannot do it for you!
 - If sharing the room with another student, ask the hotel to split the receipt when you book.
 - Enter each night as a separate line item. The tax for that night should also be a separate line item

Create a New Expense Report

Report Header

Type of Travel/Reimbursement

1. Domestic

Business Justification

Test

CREF

(0000) UNDEFINED

Country Code

Report Key

Lawson AU-UPHS COA

Report Name

School/Center

(40) MED

Affiliation

Faculty/Staff

Report Date

05/28/2021

CNAC-ORG-BC-FUND - Funding Source Program

(400-4009-2-014001) MED-SM\I

Notes to Approver

Policy

US Expense Policy

(0000) NOT PROG REL

Trip Begin Date

Trip End Date

GGEB Presentation

[Delete Report](#)[Submit Report](#)[+ New Expense](#)[+ Quick Expenses](#)[Import Expenses](#)[Details ▾](#)[Receipts ▾](#)[Print / Email ▾](#)

Expenses

[Move ▾](#)[Delete](#)[Copy](#)[View ▾](#)[«](#)

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
Adding New Expense				

<input type="checkbox"/>	05/28/2021	Taxi	\$1,000,000.00	\$1,000,000.00
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New Expense

[Available Receipts](#)

Expense Type

Taxi ▾

Type of Travel/Reimbursement

1. Domestic ▾

Country Code [?](#)

▾

Transaction Date

Business Justification

Vendor Name

City

Payment Type

Cash/Personal Credit Card ▾

Amount

 USD ▾☐ Personal Expense (do not reimburse)Lawson AU-UPHS COA [?](#)

Comment

TOTAL AMOUNT
\$1,000,000.00TOTAL REQUESTED
\$1,000,000.00[Save](#)[Itemize](#)[Allocate](#)[Attach Receipt](#)[Cancel](#)

	08/14/2019	Fixed Meals New York, New York	\$39.00	\$39.00
✓	08/14/2019 	Hotel The Marlton Hotel, New York, New York	\$957.21	\$957.21
	08/11/2019	Hotel	\$275.00	\$275.00
	08/11/2019	Hotel Tax	\$2.00	\$2.00
	08/11/2019	Hotel Tax	\$42.07	\$42.07
	08/12/2019	Hotel	\$275.00	\$275.00
	08/12/2019	Hotel Tax	\$42.07	\$42.07
	08/12/2019	Hotel Tax	\$2.00	\$2.00
	08/13/2019	Hotel	\$275.00	\$275.00
	08/13/2019	Hotel Tax	\$42.07	\$42.07
	08/13/2019	Hotel Tax	\$2.00	\$2.00
	08/13/2019	Fixed Meals New York, New York	\$58.00	\$58.00
	08/12/2019	Fixed Meals New York, New York	\$39.00	\$39.00
	08/11/2019	Fixed Meals New York, New York	\$57.00	\$57.00
	08/08/2019 	Office Supplies campus copy center, Philadelphia, Penn:	\$103.68	\$103.68
	08/06/2019 	Train New York, New York	\$114.00	\$114.00
	03/27/2019   	Conference/Registration Fees NYU-Next-Generation Genomics, New Y	\$299.00	\$299.00

TOTAL AMOUNT
\$1,666.89

TOTAL APPROVED
\$1,666.89

BGS Travel Funds

- BGS offers \$1,000 in Travel Funds per fiscal year for students to attend conferences and a one-time \$1,500 supplement for an off-site class/course.
- Travel funds only available to students who are presenting
- Link to form/instructions is available on GGEB Resources page (forms section)
- To purchase a flight using travel funds, call World Traveler/Concur with your flight information and list Tiffany Brooks (BGS Business Office Manager) as the travel approver.
- Once approved, students pay out of pocket and submit for reimbursement after the conference is over

Conferences/Textbooks/Etc.

- **Get approval from your Advisor to attend conference, purchase textbook, and confirm they will pay**
 - If the advisor is paying from a grant, they need to fill out an A21.
 - Memberships cannot be purchased with grant funds
- **Email me (cc your advisor!) with the following information:**
 - Name of conference
 - Link to registration site
 - Your username and password
 - Total cost, and what you're registering for (conference, short courses, etc.)
 - If registration requires additional information, fill this out before emailing me. If the website does not save this information, please provide me with the answers.
- **Never pay for conferences/org membership out of pocket!**

Conferences/Textbooks/Etc.

- **Get approval from your Advisor to attend conference, purchase textbook, and confirm they will pay**
 - If the advisor is paying from a grant, they need to fill out an A21.
 - Memberships cannot be purchased with grant funds
 - Advisors will have to email me their approval directly. Emails from students telling me their advisor has approved the expense won't fly with the business office.
- **Email me (cc your advisor!) with the following information:**
 - Name of conference
 - Link to registration site
 - Your username and password
 - Total cost, and what you're registering for (conference, short courses, etc.)
 - If registration requires additional information, fill this out before emailing me. If the website does not save this information, please provide me with the answers.
- **Never pay for conferences/org membership out of pocket!**

Trains

- For train travel, send me your preferred train information. Then follow the procedure for purchasing conference registrations.

Conferences (Cont'd)

- Please try to send me the requested information as soon as possible.
 - I complete the paperwork, but I do not process the payments. Don't wait until the last minute to send me your request.
 - I will cc you and your advisor when I pass the paperwork along to Joyce.