Travel and Non-Travel Reimbursement Process

Prerequisites: (you will need)

1. Receipts
2. Bank/Credit Card statement showing proof of payment. (Especially for foreign rate conversions). Only need to upload the pages that show the charge(s). Do not upload anything with your account number on it. If the account number is on the page you need to upload, [redacted] black it out first.
3. Project Account number to charge. Request from your PI.

Procedure:

1. Go to https://businessservices.usc.edu/travel/
2. Select the Travel and Expense Portal (SAP Concur)
    a. Login with your USC Shibboleth ID
3. If this is your first time, go to your Profile at the top right of the page
    a. Select Profile Settings
    b. Select Expense Delegates
        i. Select add Delegate
        ii. Add the appropriate administrator:
            1. Annie Yu annhuayu@usc.edu – Maryam Shanechi
            2. Gloria Halfacre gloriah@usc.edu – Chris Kyriakakis, Jay Kuo, Antonio Ortega, Krishna Nayak, Mahdi Soltanolkotabi, Keith Jenkins, Sandy Sawchuk, Allan Weber
            3. Talyia White tveal@sipi.usc.edu – Justin Haldar, Anand Joshi, Bart Kosko, Richard Leahy
            4. Tanya Acevedo-Lam acevedol@usc.edu – Shri Narayanan
        iii. Select Boxes: Can Prepare, Can submit reports, requests and receipts
            1. Make sure you hit save
4. DO NOT USE THE REQUESTS TAB FOR REIMBURSEMENTS
5. Go to the Expense Tab at the top
6. Create a New Report
    a. Select the type of Report (Guest or Student)
    b. Add report name (conference name is fine)
    c. Trip Type (Domestic, International, or non-travel)
    d. Expense Purpose
        i. If it is conference travel, select Professional Development/Conference/Training
        ii. If it is not conference travel, select Research Support
    e. Add a Detailed Business Purpose (this is the “why”)
    f. Traveler Type (Student, Post-Doc, etc.)
    g. Add any dates

h. You will add the account number given to you. You may have to try by text or code until it comes up.
i. Organization Code will most likely be 2031812110. If not, speak to your administrator
j. Students & Post Docs may not Claim Travel Allowance unless previously approved by your PI.
k. Hit Create Report

7. Select Add Expense tab
    a. Upload any receipts
    b. Select Edit
        i. Select Expense Type
        ii. Add any comments about the expenses
        iii. Save Expense
8. Let the Administrator know that you have completed the report and are ready for review.
9. Once the Administrator has confirmed that the report is correct and complete, you will be instructed to submit the report.
10. You should be able to review the expense report in the report library.
    a. Select the report
    b. Under report details select Audit Trail and you will be able to see where the report is during the approval process.

You will receive many emails during the approval process. These are just notifications with no action items.