Notes

Please see “Expenses by Type” document for more detailed information on types of expenses, which are reimbursable/non-reimbursable, and who should make the purchase.

Staff (engasst@pitt.edu) will continue to be responsible for completing expense reports. We are familiar with Pitt policy and can make sure that everything complies so there are no delays in processing. **We are not able to submit the report on your behalf**, however, so please make sure you go into Concur to submit it when completed.

All guidelines and policies apply to use of the University OneCard as well, including any reference made to reimbursements.

Receipts

- PDFs or photos of receipts can be uploaded onto Concur or emailed to engasst@pitt.edu, however you must hold onto the original receipt until the expense report is approved by payment processing. If it is needed and not available, reimbursement may not be possible.
- Receipts should be legible and provide sufficient detail to support the validity of the expenses charged to University. **YOU SHOULD ONLY USE A UNIVERSITY ONECARD** for purchases submitted for expense reimbursement. They should include supplier name, date of purchase, goods purchased, amount of charge or payment, payment type (credit/debit/cash). Debit/credit card receipts should show the last 4 digits of the card on the receipt (except when using a University OneCard).
- Please ensure there is no sales tax charged for purchases being reimbursed. The University is a sales tax-exempt organization, and the travel card features Pitt’s tax-exempt status. You will not be reimbursed for sales tax and may be asked to contact the vendor to get it removed. Otherwise, you may need to reimburse the university for sales tax out of pocket.

Purchases (goods)

- Computers, equipment, and software are not reimbursable (and cannot be charged to a OneCard.) Orders must be place through the department from one of Pitt’s approved vendors.
- The preferred method of purchasing is through the department; however, some items are reimbursable. Please see “Expenses by Type” for more detailed information.
- Tax cannot be reimbursed, this includes purchases made on a OneCard (some exceptions made for emergency situations, and for travel expenses.)
- The OneCard should only be used for travel and for professional subscriptions/memberships. They are not intended to be used as a general purchasing card and should only be used to purchase goods as needed during travel or in an emergency. If you are unsure whether a purchase is appropriate to make using your OneCard, please contact engasst@pitt.edu for clarification.
- Book purchases: The department has an Amazon account to make book purchases. Occasionally, it may be acceptable to use your OneCard to purchase books. It is not acceptable to use a personal credit card to purchase books.
- It is not appropriate to purchase services with a OneCard or personal card. Contact the department Business Coordinator to coordinate service payments and agreements.
Purchases from the University Store can now be made, but ONLY with the OneCard. This is a change from previous policy.

**Business purpose meals**

- Must include **at least one non-University employee** and may include other University employees whose presence is required and necessary to conduct University business. **EVENTS ATTENDED ONLY BY UNIVERSITY EMPLOYEES** *(including faculty, staff, undergraduate student employees, and graduate students with an appointment or who are paid by Pitt)* REQUIRE EXCEPTION REQUESTS FROM THE DEAN'S OFFICE. Approval should be coordinated with the Fiscal Manager and Administrative Officer in advance of the event.
- There should be no more than 15 attendees. Exceptions may be permitted, please discuss with Fiscal Manager in advance. Larger groups may be considered receptions, which are limited to $25 per person.
- The cost, including tip and tax, must not exceed $75 per-person.
- Per Dietrich School policy, alcohol reimbursements are limited to 2 drinks per person. One bottle of wine is the equivalent of 5 drinks. If the two drink per person limit is exceeded, the most expensive drinks must be excluded from reimbursement. Prior permission is required for alcohols at BYOB restaurants. No alcohol is permitted if undergraduate students are present.
- A list of attendees including their **full name and affiliation** must be included.
- The expense must be supported with itemized receipts charged to a University OneCard.
- A description of the meeting purpose must be included.
- The OneCard should be used, please request tax exemption (tax exempt number printed on card).

**Alcohol**

- (See above for alcohol at a business meal)
- No alcohol may be charged to sponsored projects or grant accounts.
- Prior permission is required from the Dean's office for alcohol at BYOB restaurants and for events/receptions. To receive permission, contact the Fiscal Manager and the Administrative Officer in advance of the event.
- No alcohol is permitted with undergraduate students present (this includes business meals).

**Travel**

- Must be billed to a OneCard; the University prefers flights and rental cars to be booked through Concur/Anthony Travel but will reimburse if you use other methods of booking travel if you use the OneCard.
- Travel cannot be reimbursed until after the return date for trip.
- Travel receipts should be turned in within 30 days of return.
- Detailed hotel and airfare receipts are required.
- If traveling for a conference, please provide backup from the program or website—including dates of the conference, and your name if you are presenting.
- If traveling for research, please provide a brief explanation.
- **If you are not asking for reimbursement for hotel and/or transportation expenses, please provide an explanation for their absence, as this will help to avoid delays in processing.**
• If you must cancel travel for any reason, please request refunds for all incurred expenses. Some expenses may be reimbursed, but only with approval (contact the department Fiscal Manager) and only with proof that the expense is not refundable.
• Air travel is expected to be the best value coach/economy airfare.
  o The “best value” total airfare may include the following basic reasonably priced services: one (1) checked bag except for extended travel or other extenuating reasons, in-flight Wi-Fi if required for business use, and overhead bin space.
• Lodging: Lodging expenses may not exceed the hotel’s rate for a standard single room.
  o Resort hotels are not permitted unless it is the site of the conference being attended, luxury accommodations are not reimbursable, hotel movie rentals will not be reimbursed and should be considered as part of the traveler’s per diem, lodging expenses within 50 miles of the traveler’s residence will not be reimbursed.