

UNC-funded Travel & Reimbursement Policy Reminders

- Food for meetings
 - Should go on p-card or T&E card whenever possible
 - Remind the vendor we're tax-exempt
 - No alcohol
 - If you have to pay out of pocket:
 - DO NOT let a student pay. UNC will no longer process these types of reimbursements for students even if they are also an employee.
 - Still tell the vendor you are tax-exempt because UNC will NOT reimburse you for the tax if you pay it
 - Tax-exempt Letter to show Vendor: <https://finance.unc.edu/wp-content/uploads/sites/298/2021/07/705-1-1f.pdf>
 - Do NOT tip more 20%. UNC will only reimburse up to a 20% tip
 - Food reimbursements must be submitted through Concur
- Always asks before paying for anything out of pocket

- Concur (<https://finance.unc.edu/services/travel/concur/>)
 - Faculty, staff, and postdocs must have an approved travel request BEFORE booking travel
 - Students aren't in Concur and should submit their travel request at: <https://forms.gle/mMqYAbuqshTHkGAWA>
 - International requests won't be approved without attached documentation showing dean/provost approval: <https://global.unc.edu/travel-operations/travel-policies/>
 - Send forms to Lindsay to route for approval and give at least 2 weeks lead time
 - Flights MUST be booked through Concur/World Travel
 - Make Caitlyn and Lindsay a delegate in Concur so we can help you with the expense (reimbursement) report
- UNC P-Cardholders
 - Email **itemized** receipts to bmeaccounting@email.unc.edu as soon as you have them
 - Make sure there is no tax charged
 - Tell us which funds to charge them too
 - Billing Cycle deadlines
 - P-Card billing cycle ends on the 15th of every month
 - Any charge that posts on the 15th or before has to have a proper receipt uploaded, be signed off with a chartfield string and approved by the 20th. Please don't wait. Send as you purchase.