

# HOW TO reimburse Faculty

<https://mse.engin.umich.edu/internal/howto/>

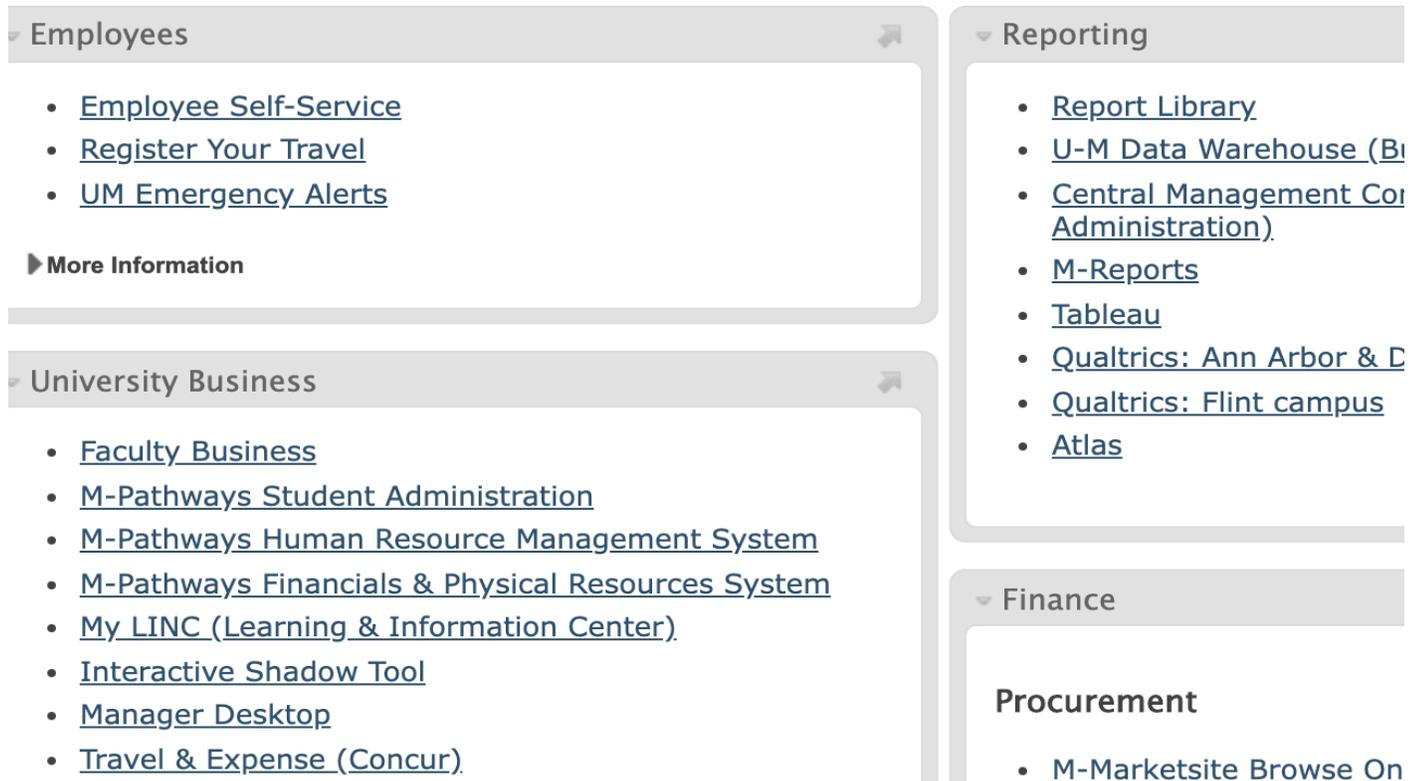
[updated February 2020]

ALL reimbursements must be processed within **45 days** of...

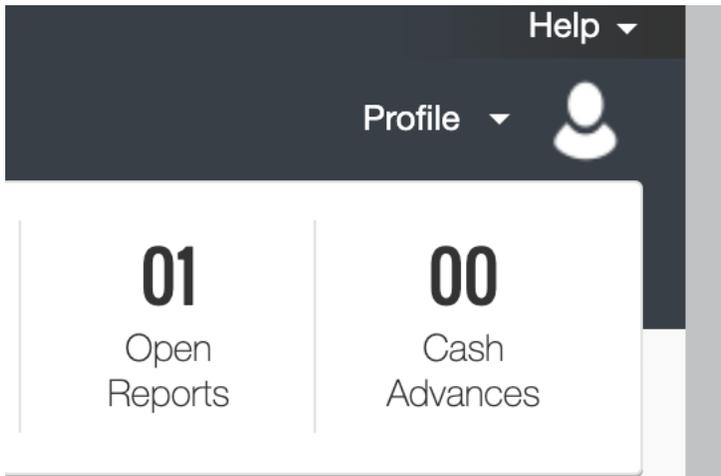
- Travel return date
- Hosting event date
- Supply purchase date

**PCard (MasterCard) -----OR----- out of pocket (NO PCard)**

Your reimbursement is processed by Staff thru Wolverine Access <https://www.concursolutions.com/home.asp>  
> faculty & staff > travel & expense (concur) [see screenshot]



Faculty will need to add Lourdes Jorgensen as their delegate in Profile [see screenshot] > profile settings



**expense delegates** > add > type email address [dla@umich.edu](mailto:dla@umich.edu) > look for staff name Debra Johnson > select name > click the boxes named: *can prepare, can view receipts, can preview for approvers* > SAVE [see screenshot]

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences

## Expense Delegates

Delegates | Delegate For

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

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approve
<input type="checkbox"/>	<b>Holihan, Amy</b> AHOLIHAN@umich.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Hou, Ellen</b> EHO@umich.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Kuhn, Kathleen</b> MKATHLEE@umich.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input checked="" type="checkbox"/>

Add/update **expense approvers** [see screenshot]

1. box 1 [default approver] = financial Admin email of Advisor / Faculty
2. box 2 [default approver 2] = email [dtrichar@umich.edu](mailto:dtrichar@umich.edu) (Derrick Richardson [Todd], Manager)

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Expense Settings

- [Expense Information](#)
- [Expense Delegates](#)
- [Expense Preferences](#)
- [Expense Approvers](#)

## Expense Approvers

Default approver for your expense reports.

Search by employee name, email address, employee id or login id

Default approver for your cash advance requests.

Search by employee name, email address, employee id or login id

Default approver 2 for your expense reports.

Search by employee name, email address, employee id or login id

Thank you, now Lourdes Jorgensen is able to process your reimbursement and submit to you for approval.

### Business Purpose

The university will reimburse Faculty & Employees for reasonable & necessary expenses incurred in connection with approved business travel & hosting & supplies for lab. A 'necessary expense' is one for which there exists a clear business purpose & which is within university [expense policy](#) limitations. The business purpose must support or advance the goals, objectives & mission of the university & must adequately describe the expense as a necessary, reasonable, & appropriate business expense for the university.

1. hosting reimbursements to be processed within **45 days** of hosting event date
2. Travel reimbursements to be processed within **45 days** of travel return date. You can only be reimbursed for business portion of your travel; personal travel expenses will not be included. *Yes, you can get reimbursed for some travel expenses prior to your travel departure (i.e. registration, airfare, lodging deposit)*
3. Supply reimbursements to be processed within **45 days** of purchase date
4. Business purpose **documentation required** (conference or seminar flyer, conference brochure, email invitation to an event, meeting agenda, etc.) with your reimbursement request, to be uploaded with your receipt

### Guidelines for receipts

- A proper receipt shows the **ITEMIZED** description of the items purchased, the **date** of purchase, the amount **paid**, and the **method** of payment. Receipts must contain appropriate detail, including starting and ending destinations, hotel charges, and detailed item charges
- Receipts for hosted meal event **requires** an **ITEMIZED** receipt (limit \$25/person breakfast, \$25/person lunch, \$55/person dinner) along with full name of all guests, their title, affiliation [university or institute] and if alcohol, mark 'alcohol' on your ITEMIZED restaurant receipt (limit \$20/person)
- receipts uploaded into YOUR concur page OR
- receipts forwarded by email to [dla@umich.edu](mailto:dla@umich.edu) OR
- receipts hand carry to
- receipts for travel meals are NOT required; your per diem will be entered into the system

### Per Diem

GSA provides [per diem rates](#) specific to major cities (both domestic and foreign). The university uses per diem allowances to cover employee meals and incidentals while on university business travel status.

### Shortcode needed

- shortcode required for each expense
- shortcode from another department? we need a contact person in that department to verify the shortcode & receive approver name
- If you traveled, complete a business travel itinerary <https://mse.engin.umich.edu/internal/forms/travel-itinerary> and forward to Lourdes Jorgensen email

When Admin completes your reimbursement in **Concur**, you will receive an email from concur with link to log into concur and review and approve before it flows to

- 1) Faculty finance approver (department admin)
- 2) Todd for approval
- 3) UM auditor for approval
- 4) direct deposit to your payroll check

If you have any questions regarding your reimbursement, contact Lourdes Jorgensen at email [jorgen@umich.edu](mailto:jorgen@umich.edu) or phone 734-763-6043.

If you have any questions about your PCard (mastercard) contact Travel Expense office at email [travelexpense@umich.edu](mailto:travelexpense@umich.edu) or (734) 764-8212, option 2

### FOR DEPARTMENT STAFF ONLY

- required receipts must be attached in the university's travel and expense system (employees) or to the travel and business hosting expense report (non-employees)
- Approvers should confirm that the attached receipts are legible
- When notes are written on small receipts, copy that receipt at copier to capture those notes, then tape small receipt onto copied page
- When business card receipt, copy vendor name side of card, then tape amount side of card on copied page
- When taping receipts, DO NOT place tape over any numbers or letters, because numbers and letters will become invisible over time, where taped
- When shortcode from another department, obtain the approver name, email address, and valid shortcode to use
- Department reference = [faculty last name] [shortcode]
- Transaction date = PAID date = lodging departure date
- Hosted events require itemized restaurant receipt, name of attendees, their titles, their university or institute
- Business purpose itinerary to be reviewed for 'meals provided', so there is no duplicate meals on same day
- Concur header page name should read:
  - PC [month][year] for PCard
  - TVL (for travel) [full name of traveler to be reimbursed]
  - HST (for hosting) [full name of host to be reimbursed]
  - REI (for reimbursement of lab supplies, ) [full name of purchaser to be reimbursed]