

PURCHASE, REIMBURSEMENT & TRAVEL PROCEDURES

Here are some tips on where to find information on purchasing, travel, and reimbursements for OSU business. For assistance with any of these please contact:

Research Grants: Erica Stillwagon 541-737-4504 Erica.Stillwagon@oregonstate.edu
All other funds: Angela Franklin 541-737-4496 Angela.Franklin@oregonstate.edu

If we are out you may contact the Business Engineering Business Center in Covell 201.

OSU Procurement and Contract Services (PaCS) “Buy Orange” web site

For information on the various contracts for purchasing furniture, supplies, and travel services, please refer to the OSU PaCS “Buy Orange” website, located at <http://pacs.oregonstate.edu/buyorange>. The Travel Button has links to the travel agencies, car rental agencies, OSU Motor Pool, and the OSU Travel policies.

Ordering equipment and supplies

Send your request to either Erica or Angela and we will place the order for you. Purchases \$5,000 and above require an OSU purchase order be issued. Purchases up to \$5,000 do not require an OSU purchase order unless the vendor requires it. We can place orders using our school credit card. We will also advise you of any vendors that you can place your orders with directly without going through the accounting person. IT-related orders should go through the COE IT group, their email is support@engr.oregonstate.edu.

Personal reimbursements

Reimbursement requests must be submitted for payment within 60 days of the purchase date and within the same fiscal year (our fiscal year ends June 30th). Reimbursements to employees should be limited to less than \$100 (excluding travel). The Personal Reimbursements policy is listed here: <http://oregonstate.edu/fa/manuals/fis/407>.

Travel Policies & Procedures

OSU travel policies are located at <http://oregonstate.edu/dept/fa/manuals/fis/411>.

Airfare (if purchased through the contracted agencies), conference registrations, Hut Shuttle, and some rental car charges can be either prepaid or billed to OSU directly. Lodging and meals must be paid personally and will be reimbursed after the trip has concluded.

- We strongly recommend that you use contracted travel agencies whenever possible. They are familiar with OSU regulations regarding airfare purchases, Fly America Act, etc. Once you have decided on an itinerary the agent will email Erica and I for authorization. We need to know the business purpose and funding source in advance of making your airfare arrangements. Travel Authorization and Travel Reimbursement Request forms are available in Rogers 204.
- Airfare purchased from a non-contracted vendor will be reimbursed after the trip has concluded. Please refer to the OSU policy on Air Transportation on the policy, located at <http://oregonstate.edu/fa/manuals/fis/411-01>, for additional information on what is allowable.
- Personal travel combined with business travel can be done as long as no added expense is incurred by the University. The contracted travel agencies can assist you with the split billing and we will authorize the airfare for the business portion and the travel agency will bill you separately for the personal portion of the trip.

- You can reserve a rental car from Enterprise Rental through the OSU Portal. After logging in go to the Employee tab and you will see the Enterprise Car Rental link under the “Employee Quick Links” on the right. You will need an index to charge when you make the reservation. Be sure to include an activity code when using your startup or special projects/ROH funds as these charges are billed and paid through the OSU Business Affairs office. If you need to make reservations by phone you will need the billing code which Erica or I can provide upon request (due to past fraudulent activity this code has to be kept secure).

Hosting Expenses

Payment requests for hosting official visitors (candidates, visiting scientists, guest speakers, etc.) must include:

- Who – Names of the individuals attending and their affiliation
- What – What is being paid
- When – Date(s)
- Where – Location of the event
- Why – Purpose of the event

Documentation includes the itemized receipt showing what was purchased (alcoholic beverages are not allowed on university funds- may be allowed on Foundation funds if approved by Rob Stone), a copy of the seminar announcement or meeting agenda.

Refer to the OUS “Non-travel Meals, Refreshments, and Other Hospitality Expenses” policy at:
<http://www.ous.edu/dept/cont-div/fpm/genl-56-100#.200> for more information.

- *Always* get an itemized receipt. Any alcohol purchased should be submitted on a separate receipt.
- Complete list of attendees is required.
- Hosting rates for the College of Engineering are as follows: Breakfast \$15, Lunch \$18, and Dinner \$45. These are per person and inclusive of tip.
- Tips can be claimed up to 15% (Rounding is okay)
- The new policy effective January 1, 2012 which encourages personal reimbursements be kept to less than \$100 *does not* apply to hosting groups or guests.
- Meals for spouses are not reimbursable.