

Dear Faculty,

As you know, the University has moved to a system-wide travel and business expense policy. Most of the changes for Amherst campus are minor and will affect you very little, however there are a few key changes that you do need to be aware of - I have outlined those for you below.

Please find resources that explain the changes and provide additional information also linked below. Please note that the department staff will still process OneCard statements and reimbursements as we always have, so we will flag anything that doesn't align with policy.

As always, please feel free to contact me with questions you may have.

Updates to policy:

- **Non-travel business expenses will no longer be reimbursable expenses**
 - This [includes](#) book purchases, office equipment or supplies, business meals, event related costs (food, space), etc.
 - To make these purchases, you can contact department staff, and we will purchase the desired item on [Buyways](#) or using the department OneCard.
 - Alternatively, faculty are welcome to apply for a [OneCard](#) and use it to make allowable purchases. (Please email Donna if you'd like to apply for a OneCard).
 - There will be [limited exceptions](#) to this policy. If you would like to request an exception, contact Donna Berg **prior to the purchase of the item**. We will issue you an exception request form that will require Department Chair and/or Dean approval.
 - If you have already submitted a reimbursement request for an item that falls in this category, or need to in the very near future, we have a very short grace period to work within, so you will be reimbursed. **Please have requests for these items submitted by August 30, 2022.**
- **New limits on business meals and alcohol & itemized meal receipts required**
 - Updated meal rates:
 - Meal rates are per-person and include tax and (up to 20%) tip
 - Breakfast: \$22.50
 - Lunch: \$37.50
 - Dinner: \$70.00
 - Alcohol can not exceed 25% of the business meal OR a single beverage per person and must be served with food.
 - Itemized receipts for all meal reimbursement requests and OneCard statements are mandatory.
 - Prior approval is required to serve alcohol at any (non-business meeting) event; please contact Donna Berg for the application to request pre-approval.

- **Pre-travel authorization is no longer needed to travel out of state with no overnight stay**
 - [Travel registration](#) is still required for all other domestic/international travel
- **Airbnb is now an allowable travel-related expense**
 - Travelers may stay in rental accommodations (Airbnb) if the total cost is equal to or less than a standard hotel/motel single room occupancy. Documentation must be provided to show cost comparison.

Submitting expenses

The process for submitting travel-related reimbursements and OneCard statements with supporting documents has not changed. As a refresher, I have provided an overview for you below.

(Unchanged) Information to note:

- Out of pocket travel expenses will be reimbursed.
- Travelers will not be reimbursed for meals in excess of the standard per-diem rate, even if itemized restaurant/meal receipts are submitted, therefore, it is better to just request the per-diem (and then you don't have to keep track of receipts).
 - However, if you charge meals to your OneCard, you will not be eligible for per diem for that day.
 - [Domestic per diem rates](#); [International per diem rates](#)
- Employees cannot be reimbursed for any travel expenses prior to the actual travel. You may still submit reimbursement requests, however they will not be filled until after travel has been completed.
 - Travelers are encouraged to use the OneCard for pre-travel-related booking to avoid delayed reimbursement.
- All reimbursement requests are taxable after 120 days from the date of purchase.
- All receipts must be (1) itemized, (2) have the card holder's last name, and (3) have the last 4-digits of the card used to make the purchase
 - If it is a restaurant receipt, it must include proof of the tip (or you will not be reimbursed for tip)
- Tip for any services will not be reimbursed over 20% of total bill (cannot go over 20%)
- OneCard purchases should be exempt from sales tax; tax information can be found on the card
 - Federal Tax ID Number (TIN) for UMass is 04-3167352.

To request reimbursement

- Email the all receipts to daberg@comm.umass.edu
 - Ensure all receipts are (1) itemized, (2) have the card holder's last name, and (3) have the last 4-digits of the card used to make the purchase
 - Include your TerraDotta ([Travel Registry](#)) number for any travel-related expenses
 - Include the [Business Expense Form](#)

- Include the funding source (or at least describe it) on the business expense form
- If you are requesting reimbursement for [an item that required prior approval](#), you must include documentation of the approval when submitting your reimbursement request.
 - Email Donna Bergl for a prior-approval request form

Bank One Card

- Ensure all receipts are itemized that say these are charge to Bank One Card
- If you purchased [an item that required prior approval](#), you must include documentation of the approval when submitting your reimbursement request.
 - Email Donna Bergl for a prior-approval request form

Resources:

[Business and Expense Policy](#) published by the controller's office

[highlighted changes for Amherst campus](#) published by UPST

[Travel Manual](#) published by the controller's office

[OneCard Program](#) information; email Donna Berg to apply for a OneCard (Only Faculty)

[FAQs](#) from controller's office