**Purchases**

All purchases must be initiated using the [Purchase Request Form](https://app.smartsheet.com/b/form/d0fd76171d174f9eaf4a4332326d440e) prior to ordering or acquisition. Once approved, a designated Superuser will facilitate the purchase.

Types of purchases include:

* IT Purchases: Includes MTurk, software, and IT devices. Note: Failure to obtain prior approval from the College of IST IT department or the University IT department may result in reimbursement delays or denials.
* Event Purchases
* General Stores Purchases
* Development and Alumni Expenses
* Multimedia and Printing
* Virtual Conference Registrations
* Memberships

Reimbursement Requests:

* Travel Reimbursement: Travel not pre-approved via the Travel Request Form.
* Group Meals: Meals involving students, visitors, faculty candidates, or club events. Please complete the Group Meal and Meeting Support Form. Attach detailed receipts and a list of attendees.

[Group Meal and Meeting Support Form](https://guru.psu.edu/forms/group-meal-and-meeting-support-form.pdf?logged=true)

To complete the [Purchase Request Form](https://app.smartsheet.com/b/form/d0fd76171d174f9eaf4a4332326d440e), you will require a budget number (Internal Order or Cost Center).

Please note that policy FN33 (created 11/2/2023) prohibits reimbursement of Pennsylvania sales tax on business purchases made with personal funds by employees. Use of personal credit cards for purchases will forfeit any incurred sales tax. When engaging with a vendor, University Tax Exemption Letters and possibly a state Exemption Certificate (REV-1220) may be necessary, accessible via the Central Procurements SharePoint site.

Purchases and reimbursement submissions should be approved within one month of purchase. For purchases near the fiscal year-end (May-June), notification to the Finance Office by July 3rd is required to ensure proper accounting per University and government policies. Delays in submission may result in non-reimbursable expenses.

**Travel**

You will **not** need to complete the Purchase Request Form if you complete the [Travel Request Form](https://app.smartsheet.com/b/form/be8e1469e75641e3b51c44bc6b5f3174). If this step was not completed prior to the travel, then the Purchase Request Form will need to be completed.

To initiate travel planning, follow these steps:

* Domestic trips require up to 2 weeks for approval; international trips require one month.
* For international travel, registration with the Travel Safety Network (TSN) is mandatory.

<https://gsn.psu.edu/login>

Complete the [Travel Request Form](https://app.smartsheet.com/b/form/be8e1469e75641e3b51c44bc6b5f3174) and attach the TSN approval email (international travel only). Include your budget number for form completion.

For travel arrangements:

* Refer to Penn State Travel Policy for guidelines.

https://policy.psu.edu/policies/tr02

* Travel should not be booked until TSN (for international travel) and the Finance Office grant approval.
* When making personal and business travel arrangements, compare costs with SAP Concur on the day of purchase, using the least expensive flight available on the platform. The comparison should only be the business portion of your trip to and from the State College airport.
* The chart below shows the reimbursement method for CONUS and OCONUS

|  |
| --- |
| **Rates by Classification** |
| **Travel Type** | **CONUS Rates** | **OCONUS Rates** |
| Domestic travel includes these areas: | 48 continental United States | Alaska, Hawaii, US Territories\* |
| Foreign travel includes these areas: | None | All locations EXCEPT: Alaska, Hawaii, US Territories\* |
| Reimbursement method: | Meals and incidentals - Per diem reimbursementAll other expenses - Actual reimbursement | Meals, lodging, and incidentals - Per diem reimbursementAll other expenses - Actual reimbursement (receipts required) |

* Contact the finance office for assistance.

For more information on allowable costs, review the Penn State Travel Policy or consult with the Finance Office for travel arrangements.

If using SAP Concur, ensure notifications are enabled under your profile settings.

Settlement of travel expenses must be finalized within 60 days post-travel (30 days if funded by a sponsored award). Failure to settle expenses promptly may result in ineligibility for reimbursement or deductions from payroll, as per the Purchasing Card Cardholder Agreement.

For inquiries, please contact the Finance Office.