**Expense Policy**

**Reimbursement of Business Expenses Incurred**

All reimbursements for business expenses incurred must be settled electronically through the Concur system. Travel expenses must be filed through “Travel”, and all other expenses must be filed through “Expense”.

A receipt (receipts) must be attached to each expense for which reimbursement is requested.

The University requires that all individuals who request reimbursement for University business expenses incurred be reimbursed by direct deposit. Prior to requesting reimbursement, employees must have established a direct deposit bank with Accounts Payable.

 Purchasers may file no more than one “expense” report to settle both SMU Card purchases and reimbursement of personally paid business expenses per month, except at year end, when yearend processes may dictate otherwise. Individuals having SMU Card expenses must file reports each month they have charges, but individuals filing more than one “expense” report per month may have their cards revoked and be subject to disciplinary actions. This policy is unlike “travel” reports which are required to be filed per trip.

Requesting reimbursement from the University for personal purchases is a violation of policy and will not be reimbursed. Individuals requesting reimbursement for or approving such purchases may be subject to disciplinary action.

Individuals are responsible for providing vendors with the University’s tax exempt information to ensure that purchases are exempt from sales tax. Individuals not doing this may be required to contact the vendor to recoup the sales tax, reimburse the University for the sales tax or file with the University’s Tax Department to file with the state for tax credit.

Individuals requesting reimbursement for business expenses are responsible for knowing and abiding by the University’s procurement rules, including using only mandatory vendors, when appropriate, as well as using preferred vendors when possible, for certain purchases and ensuring the appropriate approvals have been acquired and documented for purchases made. For instance, employees are required to use Staples for office supplies funded by the University.

Individuals submitting “expense” reports are responsible for ensuring that the coding of expenses is correct so that the University can analyze its spending. Individuals who consistently code incorrectly may be subject to disciplinary action.