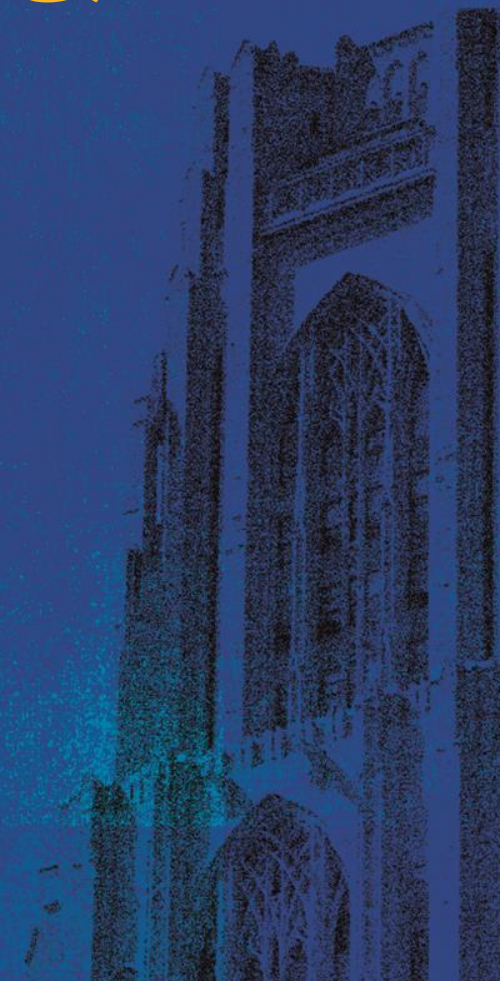


Purchase, Pay & Travel

Travel and Expense Management
Lunch and Learn
December 7, 2022



Important

- The presentation will be recorded. All Zoom participants will receive an email with the link to the recording. The recording will also be available on the Purchase, Pay & Travel website following the session.
- All participants are automatically muted on Zoom to avoid any background noise throughout the presentation.
- Enter any questions into the chat feature of Zoom throughout the presentation.

On Today's Call

Purchase, Pay & Travel

Emily Duchene- Travel Program Manager

Tammy Nolan- Manager- Purchase, Pay & Travel Customer Service

Elizabeth Lanzy-Supervisor-Payment Processing and Compliance

Tammy Berlage-Payment Processing and Compliance

Sarika Sethia-Credit Card Administrator

Jessica Rybak-Payment Processing and Compliance

Jennifer Theleen-Communications Manager

Caitlin Mutkus-Communications Specialist

Agenda

- Real ID Update
- OneCard Solution
- Training Resources and Customer Support
- Q&A

Real ID

The Department of Homeland Security announced Monday the deadline for enforcement of REAL ID has been extended from May 3, 2023, to May 7, 2025, giving states two more years to ensure their residents have compliant driver's licenses and identification cards.

OneCard



Online Statement Access

- J.P. Morgan PaymentNet System
- User name and temporary password coming

JP Morgan Chase PaymentNet

Figure 1: Welcome Screen

Home Transactions Statements Reports My Accounts Payments Help

Welcome

Items Awaiting Your Action

- [Activate Account Ending in 2538](#)
- [Activate Account Ending in 8308](#)

Alerts

You have no alerts at this time

3 Messages [Read All](#)

NEW!
Scheduled System Maintenance
System maintenance will be performed from Friday, March 13 at 8:00 PM CT through Sunday, March 15 at
[Read More](#)
Posted: Mar 6, 2020

CATHY CARDHOLDER
Purchasing Card(4857 0082 2018 2422 New) ▼

Account Summary [View Details](#)

Credit Limit	\$1,000.00
Current Balance ⓘ	\$13,259.62
Available Credit ⓘ	\$0.00

Transaction Activity

Current Billing Cycle Transactions ⓘ	\$15,670.46	View
Authorizations	0	View
Declines	0	View
Transactions for Review (Last 60 days)	0	View

Statements

Mar 06, 2020	\$13,259.62	View	Download (PDF)
--------------	-------------	----------------------	--------------------------------

Payments

Payment Due (Mar 18, 2020)	\$0.00	View Payments
----------------------------	--------	-------------------------------

Expected Delivery

- Cards are being issued
- Activation of card required
- PIN to be sent separately
- Calling J.P. Morgan – Info needed to access your card
- Birthdate: MM-DD
- Birthyear: YYYY

Governing Policies

- OneCard policy is coming
- For now, follow FN20 P-card policy and FN26 Travel Card policy
- Also, reconciliation will be following FN28 Travel and Business Expense policy (updating)

New Agreement

- A new agreement for this new card will need to be signed by all OneCard cardholders.
- Will be sent to you via DocuSign reminders sent every 2 days afterward
- Until you sign
- And fill in your Approvers name & email

Spending Tiers

Option Types:	Option 1 Rare Traveler	Option 2 Infrequent Traveler	Option 3 Frequent Traveler	Option 4 Heavy Traveler, Dept. Admin, Group Travel Arranger
Transaction Limit	\$2,000	\$5,000	\$10,000	\$20,000
Daily Limit	\$2,000	\$5,000	\$10,000	\$20,000
Cycle Limit	\$5,000	\$10,000	\$30,000	\$50,000

Current Travel card holders: Tier will remain the same or to closest tier.

Current P-card holders: Tier will be set closest to Travel card tier.

Closing of Current Forms

- P-card and Travel Card applications

Closed on 10/10/22

- Change Forms for both cards
 - Limits Only

Open

These forms that are open and closed do NOT affect your current cards.

Travel During Closing Process

- Advanced notice when the cards will be inactivated.
- If you're traveling, the recommendation is to have both cards with you – your Travel Card and your new OneCard.
- Worst case scenario, we can increase your travel card limit until you return from travel.
- If the OneCard isn't working, it is most likely due to a Merchant Category code that we can easily fix.
- What will I do with my old Pcard/Travel Card?
 - We will send out a notification in December when you can destroy your Pcard and/or Travel Card. Until then, please keep those cards in a safe and secure place.

Reconciliation

- Submit outstanding charges on the P-Card or Travel Card as you normally would.
- All OneCard charges will be reconciled in Concur
- Travel Card charges and OneCard charges can be submitted in the same report

Disputes

- Do you have disputes still outstanding on your current card?
 - The P-cards and Travel Cards won't be closed for a few months.
 - In December, the card limits will be taken to a \$1 limit to allow for disputes to be resolved.
 - Once it's resolved, you'll see a credit in your Concur queue for the amount of the dispute.
 - Reconcile it on an expense report
-
- Likewise, any new disputes that you may have on the OneCard should be reported to JP Morgan as soon as possible.

Recurring Charges

- Once you have your new OneCard...
- Update any recurring charges on your current P-card or Travel Card to the OneCard.
- Transactions will decline if it's not done by 1/1/23.

Foreign Transaction Fees

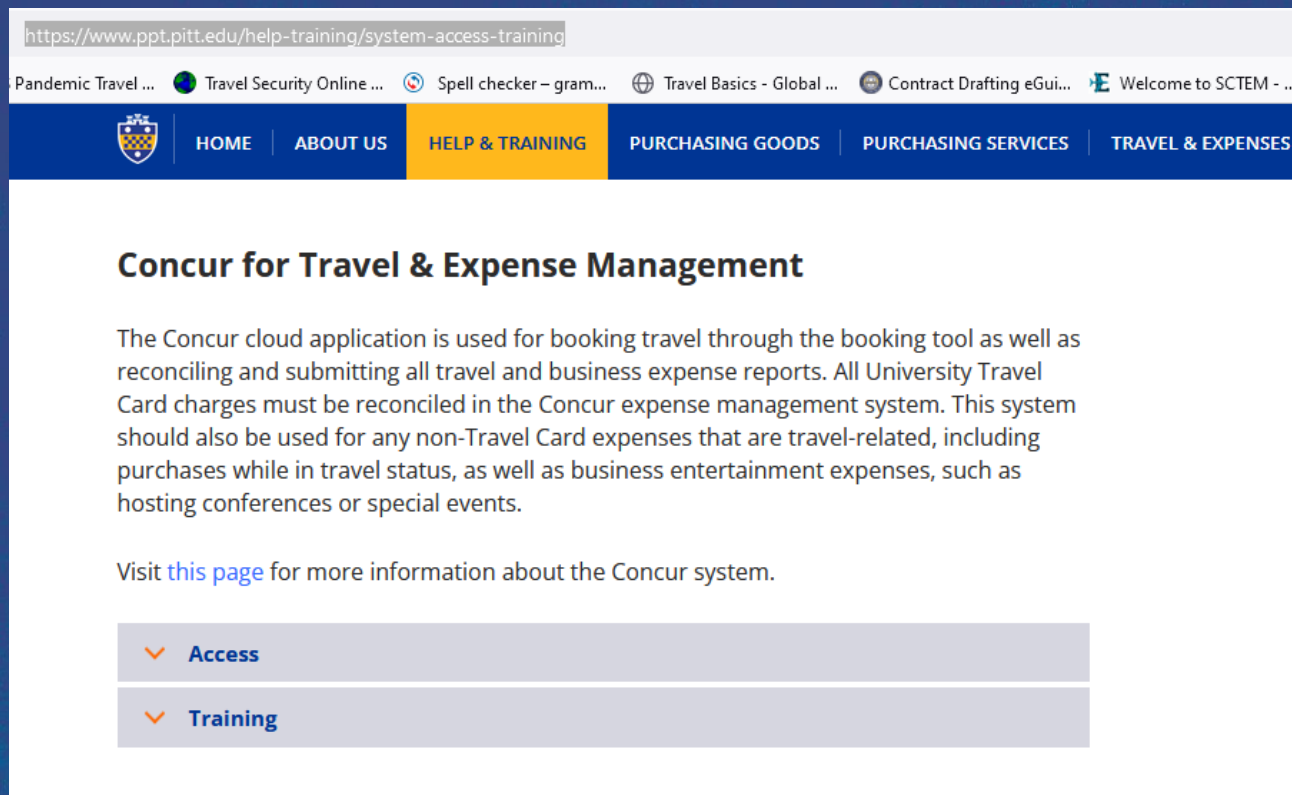
- Will still be paid by the Central University's Travel Account
- The cardholder should not see any foreign transaction fees in their Concur report, if they do please report this as a Salesforce ticket direct.
- Please include
 - Card holder name,
 - Amount
 - Date

New OneCards

- If you have never had a PCard nor a Travel Card and need to make a purchase or will be traveling soon, please reach out to the Credit Card Admin at pittcreditcards@cfo.pitt.edu

Concur Training

- Online Training is available



The screenshot shows a web browser window with the URL <https://www.ppt.pitt.edu/help-training/system-access-training>. The browser's address bar and several open tabs are visible. The website's navigation menu includes links for HOME, ABOUT US, HELP & TRAINING (which is highlighted in yellow), PURCHASING GOODS, PURCHASING SERVICES, and TRAVEL & EXPENSES. The main content area features the heading "Concur for Travel & Expense Management" followed by a paragraph explaining the Concur cloud application's use for booking travel and managing expenses. Below the text is a link to "this page" for more information. At the bottom, there are two expandable menu items: "Access" and "Training", each with a downward-pointing chevron icon.

<https://www.ppt.pitt.edu/help-training/system-access-training>

Pandemic Travel ... Travel Security Online ... Spell checker – gram... Travel Basics - Global ... Contract Drafting eGui... Welcome to SCTEM - ...

HOME ABOUT US **HELP & TRAINING** PURCHASING GOODS PURCHASING SERVICES TRAVEL & EXPENSES

Concur for Travel & Expense Management

The Concur cloud application is used for booking travel through the booking tool as well as reconciling and submitting all travel and business expense reports. All University Travel Card charges must be reconciled in the Concur expense management system. This system should also be used for any non-Travel Card expenses that are travel-related, including purchases while in travel status, as well as business entertainment expenses, such as hosting conferences or special events.

Visit [this page](#) for more information about the Concur system.


- Access
- Training


PPT Customer Service

The PPT Customer Service team is highly knowledgeable about Pitt's purchase, pay, and travel processes and systems. Contact us in the following ways:

- **Office hours:** Monday through Friday, 8:30 am to 4:00 pm
- **Phone:** 412-624-3578 (4-3578 or “HELPU”)
- **For Non-Pitt Contacts Only:**
PPTcustomerservice@cfo.pitt.edu

Concur Company Notes


SAP Concur  Administration | Help





Travel Expense Approvals Reporting App Center Profile 

Pitt Purchase, Pay & Travel

+ Start a Report	+ Enter Reservation	+ Upload Receipts	00 Required Approvals	00 Available Expenses	01 Open Reports
----------------------------	-------------------------------	-----------------------------	---------------------------------	---------------------------------	---------------------------

TRIP SEARCH

 Booking for myself | [Book for a guest](#)

If your travel is being charged to a grant funded by the Federal Government, you must follow the Fly America Act. For more information please contact your Grant Administrator or visit the website at <https://www.gsa.gov/portal/content/103191>.

COMPANY NOTES

Welcome University Faculty, Staff and Students! Please [click here](#) to visit the Purchase Pay & Travel Website.
For the current Travel Management requirements please refer to University Guidance by visiting [Meetings, Events and Travel](#).

Traveler Profile Notes:
Prior to making any online travel reservations, please make certain that your first, middle, and last names shown in your traveler profile are identical to those on the photo identification that you will be presenting at the airport.

[Read more](#)

MY TASKS

Questions?

Contact Information

- Purchase, Pay & Travel Customer Service
 - Submit an [online inquiry](#) or call 412-624-3578 (4-3578 or “HELPU”)
- Emily Duchene, Travel Program Manager:
 - Call 412-624-4398 or email educhene@cfo.pitt.edu
- Travel Card Administrator
 - For the status of an application or other questions specific to the University Travel Card, email the Travel Card Administrator at pittcreditcards@cfo.pitt.edu
- Visit the [Purchase Pay Travel Website](#)