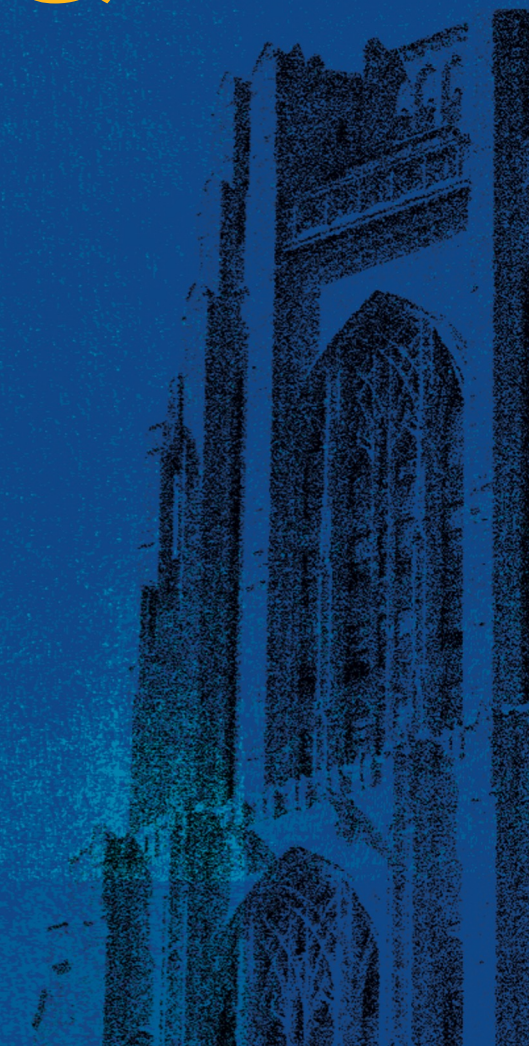


Purchase, Pay & Travel

Travel and Expense Management

Lunch and Learn

October 18, 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

University of Pittsburgh

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

Stephanie Ford-Jones-Director-Payment Processing and Compliance

Phillip Fry-Expense Report Analyst-Payment Processing and Compliance

Jennifer Theleen-Communications Manager

Caitlin Mutkus-Communications Specialist

Emily Duchene- Travel Program Manager

Agenda

- Communications Poll
- OneCard Solution
- Concur New User Interface
- Travel Booking Items
- Questions

Poll Questions

OneCard



Expected Delivery

- 2nd or 3rd week in November
- Activation of card required
- PIN to be sent separately
- Calling J.P. Morgan – Info needed to access your card
 - Birthdate: MM-DD
 - Birthyear: YYYY
- If you don't receive your card by 11/24/22, notify pptcustomerservice@cfo.pitt.edu

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 by Oct. 31st
 - Reminders sent every 2 days afterward

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

Open

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

Travel During Closing Process

- Advanced noticed 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.

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.

Online Statement Access

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

Foreign Transaction Fees

- Will still be paid by the Central University's Travel Account
 - Continue to put on Travel Account:
02.02105.(subcode).00000.000000.00001

New OneCards

- Faculty and Staff who want to apply for a OneCard, the new application will be uploaded to our site by Nov. 7, 2022.
- If traveling prior to that, please reach out to the Credit Card Admin at pittcreditcards@cfo.pitt.edu

Communications

- More Communications are coming about the OneCard
- Stay Tuned!

Concur New UI Overview

Travel Booking

- Charter Buses- Parking and Transportation
- Supplemental airline fees
 - Seat assignments
 - Early boarding
- Basic Economy
- Government Hotel Rates
- Real ID – Pennsylvania deadline is May 3, 2023

Questions?

Contact Information

- Purchase, Pay & Travel Customer Service
 - Submit an [online inquiry](#) or call 412-624-3578 (4-3578 or “HELPU”)
- Anthony Travel Booking Consultants
 - Call 412-246-9024 or email Pitt@AnthonyTravel.com
- Allison Jones, Managed Hotel Program:
 - Call 412-267-7151 or email allisonjones@anthonytravel.com
- 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](#)