Faculty Led Programs

Guidelines for Receipt Keeping & Reimbursement
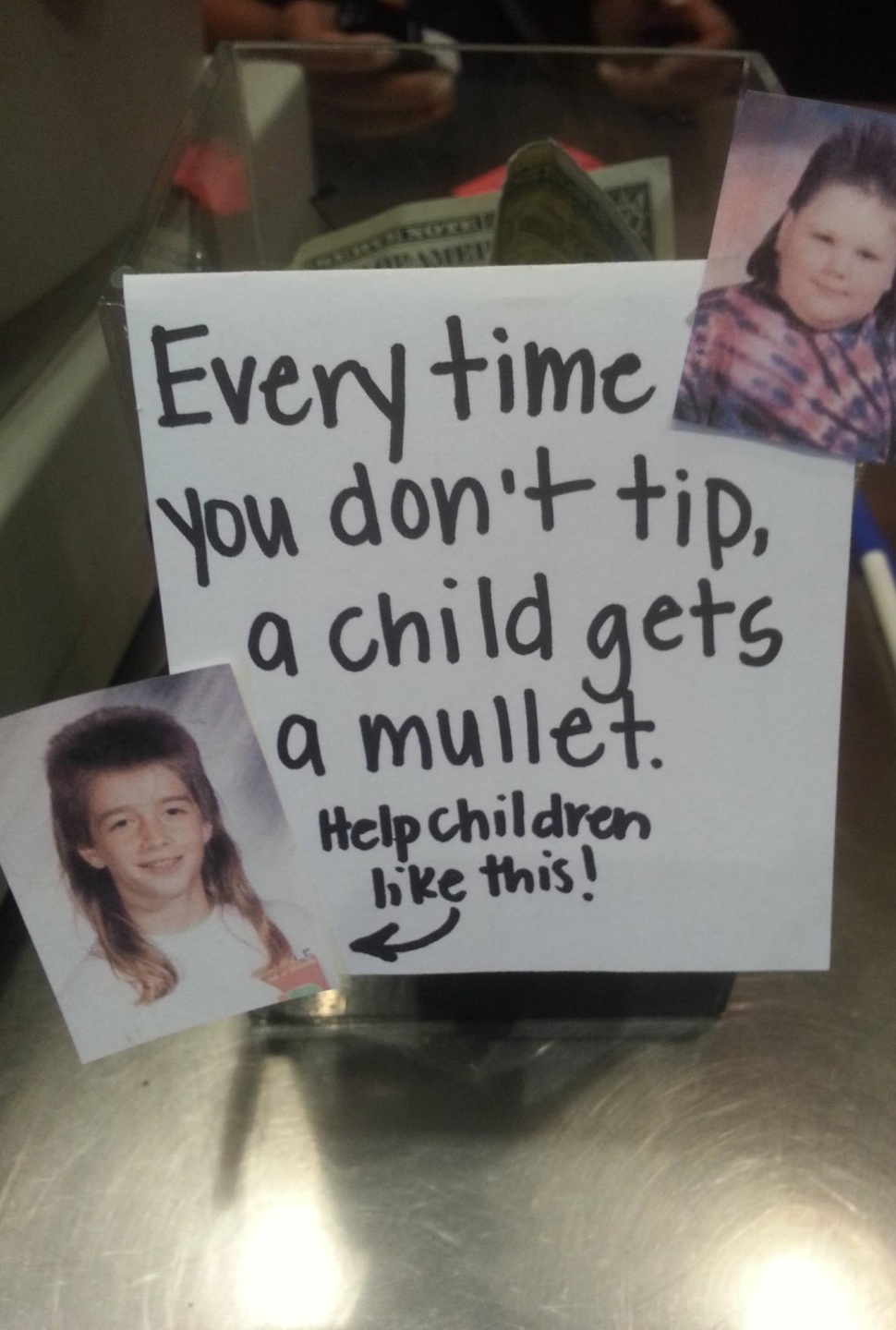
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Currency Conversions

- Currency Conversions are calculated using the [oanda.com converter](oanda.com) and day of transaction, rather than a flat conversion rate.
- If you have a credit card statement detailing the final amount in USD, this can be provided with the receipt in lieu of the oanda.com conversion.
- Receipts must clearly display the total, and date of transaction.
- If receipts are in another language, please provide a brief description of the purchase.

Tipping

- Reasonable tips and gratuities may be reimbursed as follows:
  - ✓ Actual tips paid to a taxi/bus/limo/shuttle service may not exceed 15 percent of the fare, rounded up to the next dollar. Receipts are required for any gratuity more than $25.
  - ✓ Actual amount paid for mandatory valet parking, which was necessary in the performance of business, not to exceed $1 per occurrence.
  - ✓ Actual portage charges paid, not to exceed $1 per bag or $5 per occurrence.

Receipts

- Receipts must clearly display the amount paid and date of transaction.
- If receipts are in another language, please provide a brief description of the purchase.
- If you are not able to obtain a receipt, please draft a brief statement with the following details:
  - ✓ Date of transaction
  - ✓ Name of Vendor
  - ✓ Total
  - ✓ Reason for purchase
- If a date is not visible on your receipt, please add it to the receipt.

Receipt Keeping

- There are several options for receipt keeping. Whatever method you choose, please ensure that they are organized by transaction date and/or transaction category.

- It can be helpful to create a spreadsheet or list to number receipts as you collect them. Give them a title or note to describe the purchase as well.

- The apps on the next slide are free to download and can be used to scan your receipts and email them to yourself. This is an easy way to stay organized and ensure that receipts are not misplaced and stay tidy.

- Please scan or convert receipts into PDF format before emailing.

Top three apps for scanning and organizing receipts:

1. **Office Lens** – Compatible with Microsoft Teams, OneDrive, OneNote
   - iOS/iPhone demo: YouTube Demo - Office Lens iOS
   - Android/Samsung/Google Demo: YouTube Demo - Office Lens Android/Samsung

2. **Scannable** by Evernote for **iOS/iPhone users only:** YouTube Demo – Scannable

3. **Google Drive** for **Android** users: YouTube Demo Google Drive