EDITH BAKER INTEGRATED HEALTHCARE FELLOWSHIP
CONFERENCE REIMBURSEMENT PROCESS

1. Please complete sections A and C of the Conference Reimbursement Form and submit to the program manager for approval prior to attending the conference.

2. If approved, after your conference, please submit all receipts, credit card statements, and the form (Sections A-C) in one email to the project manager following the conference. (Redact any sensitive information on the credit statement).

3. After submitting all of your paperwork via one email to the program manager, follow the below instructions to add kap86@pitt.edu and maz49@pitt.edu as "delegates" and complete your expense report in the Concur system.

   When you are ready to submit into Concur, please make an appointment with Kathy Papciak if you need assistance navigating the system.

Kathy Papciak
Research Grant Administrator
kap86@pitt.edu
412-648-4536
2306 Cathedral of Learning
EDITH BAKER INTEGRATED HEALTHCARE FELLOWSHIP CONFERENCE
REIMBURSEMENT FORM

Please complete sections A and C and submit to the program manager for approval prior to attending the conference. If approved, please submit, via one email all receipts, credit card statements, and this form (Sections A through C) to the project manager following the conference before submission into the Concur system.

Personal Information (A)

Full Name: ____________________________________________
Last                               First                               M.I.

PeopleSoft Number: ____________________________________________

Home Address: ____________________________________________
Street                                                Apartment #

City                               State                               ZIP Code

Home Phone: ____________________________ Alternate Phone: ____________________________

E-mail Address: ____________________________________________

Birth Date: ____________________________________________

Reimbursement Information (B)

Total Lodging Cost: $________________________ Total Number of Receipts Enclosed: _________

Total Flight Cost: $________________________ Total Number of Receipts Enclosed: _________

Total Ground Travel Cost: $________________________ Total Number of Receipts Enclosed: _________
Fellows may be reimbursed by the fellowship for mileage to and from the University and the conference.

Conference Fee: $________________________ Total Number of Receipts Enclosed: _________

Other Fee: $________________________ Total Number of Receipts Enclosed: _________

Total Number of credit card statements enclosed: ____________________________
Conference Information (C)

Conference Name: ____________________________________________________________

Conference Location: _________________________________________________________

Street

Building/ Location Name

City State ZIP Code

Phone: ____________________________ ____________________________________________

Website Address: ____________________________ __________________________________

Dates of Conference: __________________________________________________________

Please briefly write the learning objectives of the conference and why you wish to attend:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Please submit via email all receipts, credit card statements, and this form (Sections A-C) to the project manager following the conference. After submitting your materials to the program manager, add kap86@pitt.edu and maz49@pitt.edu as "delegates" and then upload your receipts into the Concur system. When you are ready to do this in Concur, please make an appointment with Kathy Papciak kap86@pitt.edu if you need assistance navigating the system. Your reimbursement will be processed by the University of Pittsburgh and may take up to 90 days to complete.

The BHWET Edith Baker Fellowship Program offers all fellows up to $280.00 to help defray the cost of a conference. The underwritten expenses include conference fees, transportation, lodging, and possible membership costs. Mileage will be reimbursed at 58 cents per mile.

Student Signature____________________________________________________________ Date:_________________________
Creating a Delegate in Concur

Log into Concur
Choose Profile (upper right side)
Choose Profile Settings
Go to Request Settings (left side)
Choose Request Delegates
Choose Add

Type delegates’ Pitt emails: kap86@pitt.edu and maz49@pitt.edu

Check the following boxes:

- Can Prepare
- Can Book Travel
- Can Submit Request
- Can View Receipts
- Receives Emails
- Can Approve
- Receives Approval Emails

Hit Save
Baker Fellows Conference Expense Reports

Log into Concur

- Click New
- Choose start a report
- Report Header
  1. Report Name – Your name – Name of Conference
  2. Report Date – Current Date
  3. Business Travel/Report Start Date – First day of travel
  4. Business Travel/Report End Date – Last day of travel
  5. Trip Type – Domestic
  6. Traveler User Type – Student Employee
  7. Report/Trip Purpose – Conference
  8. Event Name/Business Purpose – Baker Fellowship-name of conference
  9. Entity – 05
  10. Department – 26200
  11. Purpose – 00000
  12. Project – 130446
  13. Reference – 00000

- Are you traveling and receiving a per diem for meals – Click No
- Expense type – Conference/Seminar/Course Registration (under #02. Training, Fees and Dues)
- Receipt Date-Conference date
- Vendor Name-Name of conference
- City of Purchase- City conference was located
- Amount-Conference fee
- Attach Receipt-Attach receipt from payment of conference and either credit card statement or bank statement charged on. (Just your name and the expense is needed. You can black out all other information from you statement or just screen print)
- Click Save
- If the conference receipt and the cc or bank statement are separate you will need to click on the receipt on the left side and choose attach another receipt and save a second time.
- If you have more than one expense for the conference just add another expense line.
- Click Submit Report