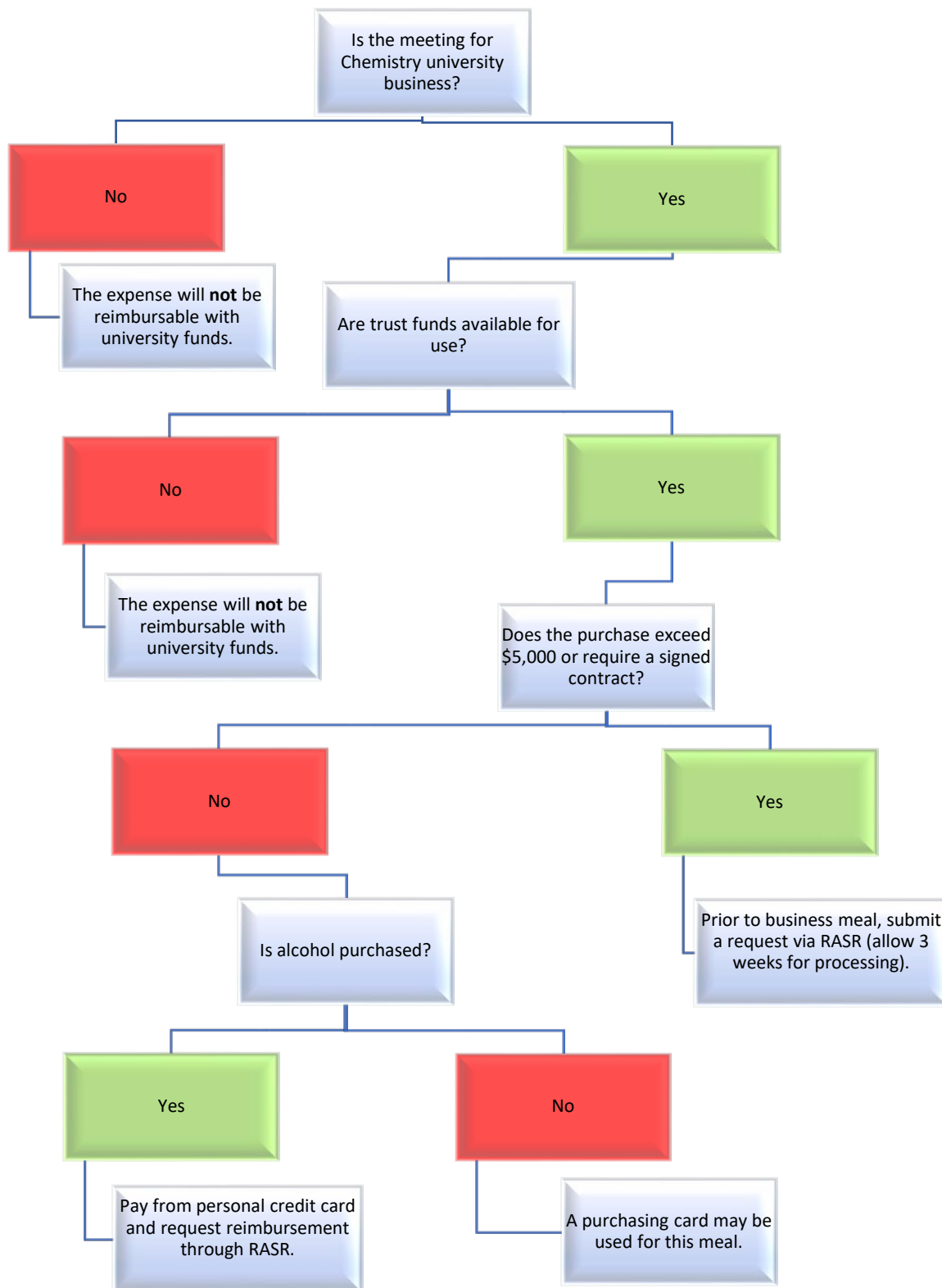


Business Entertainment Meal Purchase Decision Tree



Quick Link: RASR, <https://rasr.unc.edu>

Contact for questions: chemadmin@unc.edu

Chemistry Department Policy

Business Meetings involving meal purchases

Faculty and Graduate Students may now use their purchasing card (p-card) for meals, as long as the following applies:

- The meeting is for on-campus or off-campus Chemistry university business
- Purchase is less than \$5,000
- **Alcohol is not purchased**
- Trust Funds are available for use (ie: seminar, faculty search, graduate recruitment, faculty professorship funds, etc.) Note: projects and startup funds do **not** allow business entertainment
- No signed contract is required

Circumstances that involve using other methods from p-card:

- For purchases involving alcohol, pay from personal credit card and request reimbursement through administrative support staff. Alcohol or food outside of meals is not reimbursable.
- For purchases over \$5K or requiring a contract submit prior to business meal a request to administrative support staff (allow 3 weeks for processing)
- If the meeting is not for conducting university business or no trust funds are available the expense will **not** be reimbursable with university funds.

Required Documentation:

1. An original detailed itemized Receipt/Invoice ([sample](#))
2. Receipt with total amount paid including tip and signature (could be included on itemized (#1) or additional receipt) ([sample](#))
3. Business Entertainment Expense Form ([sample](#)), this form includes:
 - a. ✓ Pcard or Reimbursement
 - i. If Pcard list Name of cardholder
 - b. Name of requestor
 - c. Name of Restaurant or Location of Event
 - d. Purpose of event: A statement as to the reason for such business entertainment confirming business nature of meeting beyond 'business meal'. Indicate how the business entertainment benefitted the University and clarify the relationship of the persons in attendance to the particular aspects of the University's programs or activities (titles, committee names, field of interest of person being entertained, reason for visitor being on campus, etc.).
 - e. Date of Visit (event)
 - f. Name of Visitor
 - g. Visitor Type (eg: Seminar, Candidate search, etc.)
 - h. Event Type (eg: breakfast, lunch, dinner, snacks)
 - i. Number of Persons or group being entertained. If a small group (eight or fewer individuals) the names of all persons attending must be listed.
4. Agenda created on page 2 of expense form OR detailed agenda or schedule

General and meal cost limits

***General Limitations:** Alcohol without accompanying food is not reimbursable. For meal purchases including alcohol please use person card and request reimbursement.*

General (Faculty Recruitment & Seminars)

Maximum Breakfast or Lunch: \$25.00 per person for the candidate and up to three additional people. The maximum \$100.00 includes tax and tip.

Maximum Dinner: Max \$60.00 per person, for a total of \$240.00 including tax and tip. The \$240 maximum does not apply for meals charged to the industry-sponsored accounts when attended by an industry employee. Maximum reimbursement for faculty search and department colloquia dinners is \$450, including tax and tip.

Department Policy – Graduate Candidates

Maximum Lunch: \$25 per person, including tax and a tip, with a maximum of one UNC student host, and one faculty member host per visitor

Maximum Dinner: \$45 per person, including tax and a tip, with a maximum of one UNC student host per visitor, and \$45 for each faculty member.


Reimbursements from departmental funds, including industrial accounts, over the maximum allowance, require prior approval from the Associate Chair. Please attach a copy of the email approval to documentation. You will be contacted if additional information is required to approve transaction.

For chartfield information please see chart [here](#). For questions about chartfield string please contact chemadmin@unc.edu or accounting.

Detailed receipt and total example (#1 and #2 from list above)

TOPO CHAPEL HILL NC THE SOCIAL CROSSROADS OF CHAPEL HILL			TOPO CHAPEL HILL NC THE SOCIAL CROSSROADS OF CHAPEL HILL		
681 COURTNEY					
Tbl 213/1	Chk 964	Gst 6			

	Mar05'19 12:24PM				

1 Assist REG		6.00	Date:	Mar05'19 01:09PM	
1 Ram'sHead Reg		6.00	Card Type:	Visa	
1 Tea		2.00	Acct #:	XXXXXXXXXX	
2 Soft Drink @ 2.00		4.00	Card Entry:	SWIPED	
1 Cajun Chix Sand		9.99	Trans Type:	PURCHASE	
1 Southwest Chix		10.99	Auth Code:	215090	
1 Turkey Swiss		11.99	Check:	964	
1 Pork Rib Sand		11.50	Table:	213/1	
1 Top Cheeseburger		9.99	Server:	681 COURTNEY	
Add Bacon		1.00	Reference:	1600044821	
1 Chopped w/Chx		11.99			
			Subtotal:	90.96	
Subtotal		85.45	* A Gratuity Is NOT Included *		
Tax		5.51	Gratuity \$	18.00	
01:04PM Total		90.96	Total Due \$	108.96	
			Signature 		
			I agree to pay above total according to my card issuer agreement.		
			**** Guest Copy ****		

Follow Us On Facebook and Twitter! *+ 13 \$108.96*

For your convenience we are providing the following gratuity calculations:

15% is \$13.64
 18% is \$16.37
 20% is \$18.19

Entertainment Expense Form

CHEMISTRY at UNC CHAPEL HILL


Entertainment Expense

After completing this form: For Pcard upload receipts and form to works OR for reimbursement provide to admin support person

Choose one option:

Purchasing Card, Cardholder name: _____

Reimbursement



 Name of Requestor

 Name of Restaurant/Location of Event

 Business Purpose for Entertainment Expense (for example: Inorganic seminar speaker lunch to discuss inorganic research)

 Date of Visit

 Name of Visitor

VISITOR TYPE

For chartfields look here:

Inorganic Physical Named Organic

Analytical Poly/Mat Eastman Lecture

Organic

Other, please specify: _____

Biological

Candidate Search

Candidate Faculty