

Recruiting Expense Procedures

1. Use your Union College credit card for all purchases related to the search (hotel, meals).
2. Make sure to collect **original, itemized receipts** for all credit card transactions.
3. Your UC credit card should be used to purchase airfare, meals, hotels, etc. to attend a conference for recruiting purposes.

After your candidate visit or travel to a conference for recruiting purposes, please reconcile your expenses using the following directions.

Paperless Reconciliations

Reconcile charges using the Works program: <https://payment2.works.com/works/>

1. **Create a new expense report named 2018-19 Recruiting** (please name the report **exactly** as I have typed it). If you have a proxy reconciler helping you with your reconciliations, inform your proxy that your expenses will be paid for by the dean's office. They can create this expense report for you; acting as your proxy.

To create an expense report, see the drop down menu under the Expenses tab on the top of the Works Home page. Select Expense Reports. Once you have opened expense reports, you will see a Create tab on the right. Create your expense report using the drop down menu. For more information on Expense Reports in Works, please contact the Card Program Office.

Please keep this report open for the entire fiscal year to allow any additional expenses to be added to it. (For each year you have recruiting expenses, you will create a new expense report.)

2. Reconcile your transactions and/or reimbursements using your Research and Travel account number or department budget number.
3. Add all Recruiting related expenses and reimbursements to the **2018-19 Recruiting** expense report.
4. Scan your original, itemized receipts and attach the scanned receipts to the appropriate transaction and/or reimbursement. (Keep all hard-copy receipts until you are sure all charges have been approved. You do not need to send them to the dean's office.)
5. **Add a descriptive comment** (please use airfare, hotel, mileage, candidate dinner, registration fees, breakfast, lunch, dinner etc) to the transaction and/or reimbursement in Works. For charges related to a candidate please give candidate name.
6. Sign off on the transactions and/or reimbursements in Works. **REMEMBER:** *Don't sign off on the Expense Report, keep it open for the entire fiscal year.*
7. From time to time, a report will be run and funds will be transferred to your R+T/department account to cover any approved charges you have included in your **2018-19 Recruiting** expense report. **PLEASE BE AWARE:** If the charges are NOT in an expense report labeled **2018-19 Recruiting**, the report I run will not include your expenses and your R&T/department account will not be credited.