

To: Conference & Event Specialty Form Users

Sent: February 8, 2018

Update to Conference and Event Checklist and Payment Workflow

Over the past several months Purchasing Services has been working on defining and documenting a workflow to allow individuals to make Conference and Event Payments using their University Travel Card.

All conferences and events **must** have a fully-executed contract before any deposit or payment can be made.

Changes to the workflow are only necessary **if** the individual wants to process payments on the University Travel Card. You may continue to use the “Create Invoice” process in the PantherExpress System to pay by check.

For auditing purposes, all payments must be made using the same payment method for the life of the contract or through the event’s completion. If the deposit is paid using the Travel Card, then the balance must also be paid using the Travel Card and the same is true of payments processed through the PantherExpress System.

If payments are made using the Travel Card and the contract must be reviewed and signed by Purchasing Services, then the contract must be cross-referenced between the PantherExpress System and Concur for payments to be made. This is an auditing requirement and the process to complete this step is explained in our published documentation.

We have published a [workflow](#) document that visually maps the process and decision points. We have also updated the [Conferences & Event Checklist](#) and the [Purchasing Guidelines for Conferences & Events](#) to reflect changes and additional information necessary for processing Conference & Event payments.

We hope that these documents will help clarify the process. If you have further questions, please contact PantherExpress Customer Service by [submitting an inquiry](#) or by calling 412-624-3578.

Thank you,
PantherExpress – Purchasing Services