**Overview:** The gift and awards expense types are used when giving monetary or non-monetary gifts and awards to employees and students. The expense type Gifts and Awards – 693200 – is used for non-monetary gifts and awards purchased for employees and students. The expense type Gift Certificates/Cards – 691800 – is used for monetary gifts and awards purchased for employees and students. These expense types are only available in a non-travel expense report. Purchases should be made via a Duke corporate card. Please refer to [GAP 200.400, Employee Monetary Awards](#) (Gift Certificates, Gift Cards, Coupons, etc.) for additional information.

**Gifts and Awards – Non-Monetary – 693200**

**Step 1**

*From the Expense tab, select Add Expense to select the appropriate corporate card transaction from the Available Expenses list. Select Add to Report.*

Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
From the Expense, review any audit messages and select the check box next to the expense and select **Edit** to open up the Expense Detail screen.

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**Gifts & Awards Expense Types**

**Step 2 – Gifts and Awards – Non-Monetary – 693200**

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Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
GIFTS & AWARDS EXPENSE TYPES

Step 3 – Gifts and Awards – Non-Monetary – 693200

Provide the required information as outlined below.

**a.** Provide the transaction date. This will be pre-populated for corporate card charges.

**b.** Provide the vendor name. This will be pre-populated for corporate card charges.

**c.** Provide the city of purchase. This is not a required field, but may be pre-populated for corporate card charges.

**d.** Provide the business purpose supporting the gift/award.

**e.** Provide the name of the person who approved the gift/award. Per Duke policy, this must be a Dean, Director, or Department Head.

**f.** Use the drop-down menu to indicate who will pay the taxes if required. Not required if the monetary value of the item is less than $100.00.
**GIFTS & AWARDS EXPENSE TYPES**

**Step 3 – Gifts and Awards – Non-Monetary – 693200 - Continued**

- **g. Provide the payment type.** This will pre-populate to corporate card or out-of-pocket depending on the type of expense being processed.
- **h. Provide the amount.** This will pre-populate for corporate card charges.
- **i. Confirm the currency.**
- **j. Confirm the appropriate recipient information has been provided to ET&R.** ET&R requires employee/student name, DUID, and the value of gift/award provided to each employee/student reportable payments (> $100.00).

**Please note:** This box **MUST** be checked for the expense report to be processed. If the non-monetary gift is for a non-student/employee and is reportable, include the SSN and the permanent address of the recipient as outlined on the following page.

- **k. Provide comments as necessary.** This is not a required field.
- **l. If receipt is not attached, upload the receipt supporting the expense or select from the Available Expenses.**

**Step 4**

Once all information is entered and the receipt supporting the expense is attached, select **Save Expense**.
Step 5 – Gifts and Awards – Non-Monetary – 693200

Notice the message at the bottom of the screen indicating the expense has been saved. Review the exception messages and continue processing the expense report.

Please note: While this expense type is most appropriately used for non-monetary gifts and awards, some business units may use it to purchase gift certificates/cards. If the expense type is used for gift certificates/cards, since gifts certificates/cards have a monetary value, they are taxable income to the recipient regardless of dollar value. You MUST indicate who will cover taxes and you MUST provide the employee/student name, DUID, and the value of gift/award provided to each employee/student for each gift certificate/card to ET&R. DUID’s and names can be included in the expense report and included in the comments of the expense report. If a non-employee/student you must provide the SSN and permanent address. SSNs and permanent addresses are sensitive, therefore; this documentation must be faxed to ET&R or saved to your business unit’s folder on the protected data network. The folder name and location should be included in comments.
Gifts & Awards – Gift Certificates/Cards – Monetary – 691800

**Step 1**
From the Expense tab, select Add Expense to select the appropriate corporate card transaction from the Available Expenses list. Select Add to Report.

**Step 2**
From the Expense, review any audit messages and select the check box next to the expense and select Edit to open up the Expense Detail screen.
Provide the required information as outlined below.

a. Provide the transaction date. This will be pre-populated for corporate card charges.
b. Provide the vendor name. This will be pre-populated for corporate card charges.
c. Provide the city of purchase. This is not a required field, but may be pre-populated for corporate card charges.
d. Provide the business purpose supporting the gift/award.
e. Provide the name of the person who approved the gift/award. Per Duke policy, this must be a Dean, Director, or Department Head.
f. Use the drop-down menu to indicate who will pay the taxes. Since gift certificates/cards have a monetary value, they are taxable income to the recipient regardless of dollar value.
Step 3 - Gift Certificates/Cards – Monetary – 691800-Continued

g. Provide the payment type. This will pre-populate to corporate card or out-of-pocket depending on the type of expense being processed.

h. Provide the amount. This will pre-populate for corporate card charges.

i. Confirm that the appropriate recipient information has been sent to ET&R. ET&R requires employee/student name, DUID, and the value of gift/award provided to each employee/student for each gift certificate/card.

Please note: This box MUST be checked for the expense report to be processed. If the non-monetary gift is for a non-student/employee and is reportable, include the SSN and the permanent address of the recipient as outlined previously in this guide.

j. Confirm the currency.

k. Provide comments as necessary. This is not a required field.

l. If receipt is not attached, upload the receipt supporting the expense or select from the Available Expenses.
Step 4 - Gift Certificates/Cards – Monetary – 691800

Once all information is entered and the receipt supporting the expense is attached, select **Save Expense**.
Step 5 - Gift Certificates/Cards – Monetary – 691800

Notice the message at the bottom of the screen indicating the expense has been saved. Review the audit messages and continue processing the expense report.

Please note: Gift card purchases used to provide payments to research participants are processed in accordance with GAP 200.420, Processing Payments to Research Participants. The expense type Experimental Subjects/Blood Donors – 622500 should be used.

For retirements gifts, please review the guidance for Recognizing the Retirement of Staff Members to ensure all requirements have been met.