

## Documentation for Expenses Related to Official Functions, Training and Recruiting

- “WHAT” must describe the EXPENSE (such as breakfast, coffee, etc.)  
 “WHY” must describe the EVENT (such as staff meeting, recruiting, training)  
 “HOW” must describe the EXPENSE (How does the EXPENSE benefit the University? Such as: everyone knows recruiting as an event that helps the University locate quality students and employees. However, if the expense is dinner, we must document HOW that dinner provided a necessary benefit towards achieving our goals.)

“WHO” attended the event. Please list names (if more than ten, list the number and categories (for example “15 students and 20 faculty members”).

1. \_\_\_\_\_ ← Name on PCARD, if used
2. \_\_\_\_\_ \*\* Account # :
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

WHEN. Please cite the date(s) of the event.

\_\_\_\_\_

WHERE. Please note where the event was held.

\_\_\_\_\_

WHAT was the expense:

_____ Breakfast	_____ Lunch	_____ Dinner
_____ Coffee Service	_____ Decorations	_____ Hors D’oevres
_____ Snack		
_____ Other: _____		

WHY was the event Held:

_____ Training	_____ Recruiting	_____ Client Meeting
_____ Staff Meeting	_____ Fund Raiser	_____ Recognition
_____ Team Meeting		
_____ Other: _____		

HOW did this expense benefit the University or the official goals of your program:

- \_\_\_\_\_ Extended contact to include normal meal times.
- \_\_\_\_\_ Created an atmosphere necessary to attain goal (cited in “WHY” above).
- \_\_\_\_\_ Encouraged event participation to attain the goal (cited in “WHY” above).
- \_\_\_\_\_ Enhance social interactions to build community.
- \_\_\_\_\_ Reward outstanding performance (by an employee or other).
- \_\_\_\_\_ Provided a forum to raise awareness of an issue.
- \_\_\_\_\_ Provided an opportunity to welcome visitors.
- \_\_\_\_\_ Provided a setting to foster vital contributions toward the selection of a best candidate.
- \_\_\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_  
 Official Function Approver Signature

\*\*If different than the Department Account #