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:

____________________________________________________________________

**If different than the Department Account #

Official Function Approver Signature