Procurement Card Expense Form

Procurement Card Handbook

Sensitive Expenses

Expense Justification Requirements & Guidelines

Examples of Detailed Justification

Department/Unit *

- Select -   1

Are you completing this form on someone's behalf? *

○ Yes

○ No   2

Cardholder First and Last Name *

[   ]   3

Cardholder E-mail *

[   ]   4

Department/Unit/PI E-mail

[   ]   5

Expense 1: Vendor *

[   ]   6

Expense 1: Amount *

[   ]   7

1. Select Mechanical Engineering.
2. If you are completing this form on your own behalf, select 'No'.
3. Enter your first and last name.
4. Enter your email.
5. Enter your PI email if you would like them to be notified of your submission.
6. Write the name of the vendor your first expense is from.
7. Write the amount charged from the vendor, making sure it matches the amount shown in Concur.

Expense 1: Speedtype 1 *

(8)

Add a funding split? * ○ Yes ○ No **(9)**

Expense 1: Description of item(s) *
What did you buy? Books, office supplies, etc.

(10)

Expense 1: Business Purpose *
How does this purchase benefit CU business?

(11)

Expense 1: Is this an official function? * **(12)**
i.e. food purchases

○ Yes

○ No

Expense 1: Is this a software purchase? * **(13)**

○ Yes

○ No **(14)**

Expense 1: Attach Receipt 1

Choose File | No file chosen   Upload

Files must be less than **5 MB**.
Allowed file types: **jpg jpeg png tif pdf doc docx xls xlsx**.

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8. Enter the Speedtype you would like the expense allocated to.

9. If you would like to allocate the expense to multiple Speedtypes, select 'Yes'.

10. Enter a description of what the items are that were purchased.

11. Explain specifically how what was purchased will benefit CU business and how the item directly benefits the Sponsored Project you are charging to.

12. Official functions are often business lunches, food purchases, meeting expenses, etc.

13. If this is a software purchase, an ICT review will need to be attached in the following steps.

14. Attach the receipt for your expense. If there are multiple attachments needed, there are extra fields that you can attach receipts to.

For a bulk submission (full month PCard expenses exceeding 3 expenses), the cardholder may upload a PDF ME Procurement Card Form with all details filled out for each expense.

1. Attach the PDF ME Procurement Card Form and the first 2 receipts to "Expense 1" area (use all the file uploads on Expense 1 area).

2. Then upload the rest of the receipts in the "Additional File Uploads" area at the bottom (it's collapsible).

3. To fill out the "Expense 1" portion, you fill in unit, cardholder name, and e-mail.

4. Then write "See Attached Form for details" on the Vendor box, and enter "N/A" in the rest of the required boxes in the electronic form.