

Exceptional Approval Worksheet for Entertainment & Travel

Form U5-8EW(12/99)

Use if your Control Point requires approval of Entertainment or Travel Expenses. Use to document BUS-79 Exceptional Expenses and any Control Point enforced restrictions. Attach to Request for Payment (Form U5-8E).

TO: _____
Chair or Dean Department or College

EVENT: _____
Type, nature, purpose and date(s) (attach participant list with affiliations and other backup documentation)

Name of host	Department	Number persons	Total amount
--------------	------------	----------------	--------------

This request for approval includes the following exceptional T/E expenses:

- () Expenses that exceed the per-person maximum rates (BUS 79, Appendix A)^{1,2}. _____
- () Entertainment of the spouse (or equivalent) of a host or a guest (BUS-79)¹. _____
- () Tickets to entertainment or sporting events (BUS-79)¹. _____
- () Morale Building (BUS-79)^{1,3}. _____
- () Purchase of alcohol (Control Point)⁴. _____
- () Other exceptions: _____

Budget name for regular expenses	Account	Total regular expense
----------------------------------	---------	-----------------------

Exceptional expenses (BUS-79 and alcohol)	Account	Total exceptional exp.
---	---------	------------------------

JUSTIFICATION for exceptional T/E expense: for example, why higher costs were unavoidable and necessary to achieve a University business purpose:

Prepared by _____ Extension: _____ Department: _____

Signatures: _____
Control Point Principal Investigator, if required* Date

*For expenditures of extramural funds, signature of the Principal Investigator (or designee) assures that 1) the expenditure is consistent with the terms of the contract/grant and 2) sufficient funds are available.

CONTROL POINT RESPONSE: () APPROVED () NOT APPROVED

Signature granting exceptional expense approval _____ Date: _____

¹ Exceptional expenses under BUS 79 cannot be paid with State or Federal funds.
² Rates include taxes and service. Rates do not include the rental of meeting or conference facilities, which may be charged as an additional expense.
³ The following type events are disallowed under BUS-79 and cannot be approved as exceptional entertainment expense: employee birthdays, weddings, anniversaries, farewell gatherings (other than retirement), Secretary's Day, etc.
⁴ Alcohol, flowers and tobacco can only be charged to non-state and non-federal fund sources that specifically allow such charges, subject to exceptional approval where required by Control Point.