

Sample Business Purpose (Justification)

General Information:

- * A guideline to use when considering the relevant information to support the expenses are the 5 W's:
 - **Who** was involved in the expense?
 - **What** does the expense represent?
 - **When** did the expense occur (if other than transaction date)?
 - **Where** did the expense occur?
 - **Why** or how does the expense relate to University business?

While all of these questions may not apply to every transaction, the information should be included whenever available and relevant.

Business Justification Tips for the “Purpose” field of the Expense Report:

- ✘ NO: Presented at XYZ Conference
- ✓ YES: Presented paper @ XYZ Conference [location & dates] to discuss research [description of research] with [Name(s)].

- ✘ NO: Lunch meeting
- ✓ YES: Lunch meeting on [Date] with [Name of visitor] to discuss [name] research project. (List all attendees)

- ✘ NO: Membership
- ✓ YES: Membership to provide certification for a program that I need in order to complete my [name of research] work.