



Chrome River User Manual

BUSINESS PURPOSE

All Expense Report and UMB Pcard Expense lines in Chrome River require a clear business purpose. A business purpose is defined as one that supports or advances the goals, objectives and mission of the university; and adequately describes the expense as a necessary, reasonable and appropriate business expense for the university.

This document provides guidance on what information to include in the business purpose field within Chrome River.

BUSINESS PURPOSE EXAMPLES

Insufficient Business Purpose	Appropriate Business Purpose
Conference	Attending 2020 CACUBO Conference, Orlando FL. This conference provides professional development and networking opportunities with industry peers in the Higher Ed field.
Taxi fare	Taxi from Airport to Hotel
Supplies	Various supplies purchased to repair the air handler located in the Financial Operations building.
Furniture	Furniture items purchased to set up the (office/conference room/classroom) to provide a functioning space.
Office Supplies	General office supplies purchased to support the daily office functions of the accounts payable department.
Mileage	Monthly business-related travel (personal mileage, parking, tolls) incurred as part of the WSU Outreach program.
Registration	Conference Registration to present grant research findings on NASA's new space shuttle.
Lodging	Lodging purchased for visiting lecturer, Joe Smith.
Meal	Recruitment Lunch - Sarah Smith
Freezer	Freezer for storage of research samples in Dr. Smith's lab.



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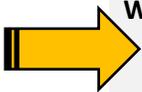
ELEMENTS OF AN APPROPRIATE BUSINESS PURPOSE

Whenever requesting reimbursement or justifying an expense placed on a Pcard, the business purpose should clearly describe the reason for the expenditure. The 5 “Ws” (Who, What, Where, When, and Why) are a great way to help you determine the information you should enter in the business purpose field for it to be an appropriate response on **each expense line** in Chrome River.

As described in the table below, much of the information needed to describe each expense is covered with the information entered on the report header and/or individual expense lines.

TRAVEL EXPENSE REPORT - 5 W’S

<p>WHO</p>	<p>This is typically answered by the employee submitting the expense report. When an expense is incurred on behalf of someone else, such as a student or candidate, the name of that individual should be included in the Report Header and corresponding Student Information or Candidate Information fields.</p> <p>If travel expenses were incurred on your pcard for another employee, the name of that individual should be included in the Business Purpose field of the associated expense line.</p>
<p>WHAT</p>	<p>This is usually answered by the attached supporting documentation, as well as the expense tile and account code selected for the expense line.</p>
<p>WHERE</p>	<p>The location of the expense is often identified in the destination field on the report header. When this is not the case, the “where” should be included in the Business Purpose field.</p>
<p>WHEN</p>	<p>The transaction date will often identify the when. If not, you can include the dates in the Business Purpose field (i.e.: CACUBO Conference March 1-March 3, 2020).</p>
<p>WHY</p>	<p>The “why” is the most important piece of information to support a business need. This describes why the university is paying for the expense and how the expense supports the mission of the university.</p>

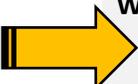




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PCARD RECONCILIATION REPORT - 5 W's

• **Important!** The **Business Purpose** field at the expense line level defaults from the report header and in most cases will not provide enough information about the individual expense to satisfactorily answer the 5 W's described above. It is important that you review and overwrite the business purpose information that defaults in on **each** expense line to more clearly explain why the specific expense is necessary and appropriate.

WHO	This is typically answered by the employee submitting the pcard reconciliation report. If you purchased items for another department, include the department's name in the Business Purpose.
WHAT	This is usually answered by the attached supporting documentation, as well as, the expense tile and account code selected for the expense line. Please provide a description of items that are hard to identify based upon the receipt information (i.e.: if receipt listed <i>23/32 in x 2 ft. x 2 ft.</i> - enter <i>sheet of plywood</i>).
WHERE	List the department, program, or building location associated with the purchase.
WHEN	The transaction date will often identify the when. If not, you can include the dates in the Business Purpose field.
 WHY	The "why" is the most important piece of information to support a business need. This describes why the university is paying for the expense and how the expense supports the mission of the university.

UNACCEPTABLE BUSINESS PURPOSES

<p>One word responses such as:</p> <ul style="list-style-type: none"> • Supplies • Postage • Widget • Advertising • Food 	<p>Vague descriptions such as:</p> <ul style="list-style-type: none"> • Meal with colleagues • Traveled with staff • Membership • Presented at conference • External hard drive • Computer supplies • Summer event • Classified ad for job opening
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