

Quick Tips: Business Justification

Purpose (justification):

- ❖ Must be a **business** reason
- ❖ Must be fully descriptive and transparent
- ❖ Must explain how the expenditure(s) relate to the achievement of the program objectives and outcomes.
- ❖ If charged to a grant, include how the travel relates to project research.
- ❖ At times it is necessary to “Justify” individual expenses
- ❖ Late Expense Reports (greater than 60 calendar days from date of travel return) must include a **detailed justification** for lateness and **authorized signature (Dept. office requires 7 business days for review and release)**

Sample Business justifications:

- ❖ **NO** - Collaboration @ University of XXXXX
- ❖ **YES** - Collaboration @ University of XXXXX with Dr. John Smith on [description of research work] on July 25, 2017

- ❖ **NO** - Conference travel to NIPS
- ❖ **YES** - Conference travel to NIPS held in Ontario Canada, August 5-9, 2017. NIPS helps to foster the exchange of research on neural information processing systems in their biological, technological, mathematical, and theoretical aspects. This is the work directly related to the project research on this NSF grant. Include “role” at conference – presenter, presented paper, etc.

- ❖ **NOTE**: Conference agendas **MUST** be included with all reimbursement requests.

Creating new reimbursement:

- ❖ Go to Actions (on right) and select “Create Expense Report”
- ❖ Fill in the Purpose: description of the trip is required. See Sample Business Justifications above.
- ❖ Under attachments:
 - ❖ Add conference schedule and any general justification/back-up.
- ❖ Under expense items, use the + sign to add a new line:
 - ❖ Create expense item:
 - ❖ Date which is when the purchase took place (e.g. for registration and flight can be much earlier)
 - ❖ Don't touch template
 - ❖ Pick the appropriate type – NOTE: if you change the type after you added the account info. The system resets the fields and you have to put the account information in again.
 - ❖ Add the amount
 - ❖ Upload the corresponding attachment
- ❖ Add a description*, merchants name (everything with an asterisk must be completed)
- ❖ Expenses on different dates should be charged separately.
- ❖ You can duplicate previous items – makes it go a little faster.
- ❖ Project numbers are provided only by faculty/advisers or designates.

* Add details for trips with Taxi/Uber e.g “to hotel from airport”