

## Official Occasion Expense Form

To prevent a personal tax liability, each occasion must be documented by receipts for expenses. The following written statement must accompany the payment voucher for processing within 30 days of the occasion.

Circle the Object Code to be Used	Object Code
<b>Working Business Meeting</b>	1327
<b>Conference/Workshop</b>	1324
<b>Official Occasion</b>	1323

Account to be charged: \_\_\_\_\_

Form prepared by: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Date: \_\_\_\_\_

Location/Place: \_\_\_\_\_

Date of Event: \_\_\_\_\_

<u>Name of Participant(s):**</u>	<u>Title(s)</u>	<u>Affiliation(s)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

(\*\*Required if 10 or less)

**Group Attending:**

\_\_\_\_\_  
\_\_\_\_\_

**Purpose of the event:**

\_\_\_\_\_  
\_\_\_\_\_

**Benefit to The University of Texas:**

\_\_\_\_\_  
\_\_\_\_\_

**Requested by:** \_\_\_\_\_  
Authorized Signature/Designated Signer

**Date:** \_\_\_\_\_

\_\_\_\_\_  
**APPROVED:** \_\_\_\_\_  
Dean or Vice President

**Date:** \_\_\_\_\_

**OFFICIAL OCCASION EXPENSE FORM**

**INSTRUCTIONS**

An Official Occasion Expense Form is optional, but it includes all data necessary to process a reimbursement request for an official occasion or entertainment expenses.

**Date of Event:** Date of event, not the date the form is being completed.

**Location/Place:** Name of business establishment, restaurant, etc. where event occurred. If event did not take place in Odessa, please identify city and state.

Examples:

Mesa Bldg, room 100  
Eastwoods Park  
**County Line Restaurant, San Antonio, Tx.**

**Participants:** List participants by name, title, and affiliation, if ten or less.

Examples:

If 10 or less

<u>Name of Participant(s)</u>	<u>Title</u>	<u>Affiliation</u>
Dr. Joe Doe	Professor	UTPB, School of Business
Dr. Jane Dee	Professor	Texas A&M Univ., ME Dept.
Dr. Jill Gee	Professor	Texas Tech Univ., ME Dept.
John Hee	Manager	Motorola

**Group Attending:** If more than ten people participated, supply a general description and approximate the number of people that attended.

Example:

General description if over 10

Civil Engineering graduate students and faculty in the Water Resources area. Twenty-five people attended.

**Purpose:** Supply a brief explanation of the purpose of the event.

Examples:

Refreshments were provided at meeting to discuss joint research projects between UT Permian Basin, Texas A & M, Texas Tech, and Motorola.

Buffet was provided at reception for graduate students to meet new faculty members in the department.

Lunch was provided to people attending all day meeting of the department's visiting committee.

**Benefit to UT:** Supply a brief explanation of how the event is expected to benefit the university or the benefits actually derived from the event.

Examples:

To further the relationship between higher education and industry in the area of microchip research. Motorola has entered into an agreement to provide funding for 3 years to the research consortium between the universities.

The visiting committee provides the department with guidance in the direction the department should be going with respect to educational issues.

**Signatures:** As required for applicable approvals.