

## Official Occasion Expense Form

To prevent a personal tax liability, each occasion must be documented by itemized receipts for expenses. The information requested on this form must accompany the payment voucher for processing within 30 days of the occasion.

<b>Circle the Object Code to be Used</b>	<b>Object Code</b>
Official Occasion or Administrative/Business Meeting	1347
Official Student Occasions	1309

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

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

Location/Place: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of Participant(s):\*\* \_\_\_\_\_ Title(s) \_\_\_\_\_ Affiliation(s) \_\_\_\_\_


(\*\*Required if 10 or less)

If over 10, group attending and approximate or actual number of people attending:

Purpose of the event:

Benefit to The University of Texas:

Estimated Cost: \_\_\_\_\_ Actual Cost: \_\_\_\_\_

Requested by: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Signature/Designated Signer

Department \_\_\_\_\_

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

Dean or Vice President or Official Delegate

## OFFICIAL OCCASION EXPENSE FORM INSTRUCTIONS

The Official Occasion Expense Form is a tool to ensure that all data necessary to process a reimbursement or payment request for an entertainment expense is submitted.

**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 Austin, please identify city and state.

Examples:

Faculty Center	Eastwoods Park
ECJ 10 <sup>th</sup> Floor, Dean's Conference Room	County Line Restaurant
<b>County Line Restaurant, San Antonio, TX</b>	

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

Examples:  
If 10 or fewer

<u>Name of Participant(s)</u>	<u>Title</u>	<u>Affiliation</u>
Dr. John Doe	Professor	UT Austin, ME Dept.
Dr. Jane Doe	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 or actual 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 events.

Examples:

Refreshments were provided at meeting to discuss joint research projects between UT Austin, 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.

**Estimated/Actual Costs:** The individual signing the "prior to" OOEf's needs to know the estimated expenses for the event so that they can make an educated decision whether or not to approve the OOEf request.

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