

GROUP MEAL AND MEETING SUPPORT FORM

PURPOSE: This form is used to document business purposes and attendees at a group meal or meeting. As supporting documentation this form, and receipts, are to be uploaded into the appropriate system: Shop OnLion Shopping Cart, SIMBA, or SAP Concur.

REQUIRED USE: Purchase Orders, Direct Bill, Internal Service Request (ISR), Journal Entry, and Non-PO Invoice processes. Purchasing card transactions when the meal is hosted by someone who is not a work flow approver or when hosted by someone who is not the employee submitting the expense report in SAP Concur.

OPTIONAL USE: Purchasing card transactions when the budget administrator is the host or when budget administrator is a workflow approver.

TO BE COMPLETED BY GROUP MEAL OR GROUP MEETING EVENT HOST
Paid by (select one): _____

Transaction Document #: _____

Cost Collector: Cost Object Type:
Business Area #:
Cost Object #:
Grant #:
GL #:
Amount:
Event Date: _____ **Event Host:** _____

Restaurant or Vendor:
Restaurant or
Vendor Address:
Business Purpose: _____

Name of group/committee/commission: _____ **# of Attendees:** _____

Name of Guest(s) (Include titles) (or attach separate list): _____

Name of Penn State Employees (or attach separate list): _____

(Note to FO: If only Penn State employees are in attendance, this expense must be charged to an unallowable GL (ending in a 1))

Name of Penn State Students (or attach separate list): _____

(Note: If undergraduate students, the Vice President for Student Affairs must approve.)

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| 1. Total Amount on Receipt: | |
| 2. Gratuity (if not on receipt): | |
| 3. Total Cost of Meal or Meeting Expenses: | |
| 4. LESS (Amount not to be reimbursed or paid): | (_____) |
| 5. TOTAL (Amount charged to cost collector - line 3 less line 4): | |

NOTE: The purchase of alcoholic beverages and the prorata portion of any gratuity is limited to certain unrestricted donor funds (see Policy FN10). In no case may alcoholic beverages be charged to general funds of the University.

Are alcoholic beverages included in the total for settlement in line 5 (Total), above:

If YES, what is the total cost of alcohol with prorated gratuity included in line 5 (Total), above?

AUTHORIZATIONS:

I certify the above expenses are accurate, University business was conducted, and that reimbursement/settlement has not been, and will not be, requested or received from another source.

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| Event Host signature (required in accordance with Policy FN18) | Date |
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| Budget Administrator (or delegate) signature (required in accordance with Policy FN18) | Date |
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| Budget Executive signature (required if graduate students will be present and alcohol provided in accordance with Policy FN10) | Date |
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| Vice President for Student Affairs signature (required if undergraduate students will be present and alcohol provided in accordance with Policy FN10) | Date |
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|---|------|
| Financial Officer (or delegate) signature (required in accordance with Policy FN18) | Date |
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