

Hospitality Justification User Guide

1. Click on the Hospitality Justification Form link on the [ABA Forms Page](#) to begin filling out the form
2. Use the drop down menus to select the Type of Hospitality and Type of Event

A screenshot of the form's top section. It features three dropdown menus: 'Type of Hospitality' (set to 'Choose from List'), 'Type of Event' (set to 'Choose from List'), and 'Business Purpose' (set to 'Entertainment Services').

A screenshot of the 'Type of Event' dropdown menu. The menu is open, showing a list of options: Business Meeting, Community Outreach, Department Meeting, Employee Recognition, Employment Recruitment, Fundraising, Host of Official Guest, Reception, and Student Programs. 'Business Meeting' is currently selected.

3. Enter the Official Host's Name - Must be an Employee
4. Enter the Department and Contact information
5. Business Purpose of Hospitality Expense
 - a. Why was the expense necessary?

Example of thorough explanation

A screenshot of the 'Business Purpose of Hospitality Expense (Why was the expense necessary?):' field. The text entered is: 'Annual department team-building lunch put on to strengthen bonds, form connections, celebrate accomplishments, and recognize the hard work of department employees.'

Missing description

A screenshot of the 'Business Purpose of Hospitality Expense (Why was the expense necessary?):' field. The text entered is: 'Department Lunch'.

6. Enter Business Unit (SACST, SAFDN, SACPR)
 - a. Line Item Name - Can be a general description of the item ie. (Lunch, Dinner, Promo Items)
 - i. Meant to separate different hospitality expenses for the same event
 - b. Hospitality related expenses (include tax and gratuity/tips for meals)
 - c. Total Amount - Auto Calculated
 - d. Account: Drop down menu is limited
 - i. If the account number you want to use it not available please note it in the notes section below
 - ii. **Do Not Use 660003**

Multiple Business Unit Example

Business Unit	Transaction Name	Amount	Account
SACST	Staples	\$ 10.00	Choose from List
SAFDN	Engrained	\$ 50.00	Choose from List
SACPR	Aramark	\$ 75.00	660090 Expenses-Other
			660801 Fundraising
			660819 Catering Costs
			660820 Food/Beverage-
			660829 Preseason
			660832 Special Events
Total Amount:		\$ 135.00	

ProCard Statement Example

Business Unit	Transaction Name	Amount	Account
SACST	Amazon	\$ 24.65	Choose from List
SACST	Staples	\$ 60.24	Choose from List
SACST	Safeway	\$ 28.12	660017 Promotional Exp
SACST	Engrained	\$ 379.18	660042 Employee Recruit
SACST			660090 Expenses-Other
			660801 Fundraising
			660819 Catering Costs
			660820 Food/Beverage-M
			660829 Preseason
			660832 Special Events
			Other - Explain in Notes
Total Amount:		\$ 492.19	
Notes:			

7. Event Details

- a. Frequency - evaluated on a case-by-case basis
- b. Event Location
- c. Date(s) of event

Is this a reoccurring meeting?	No
If yes, how often:	<input style="width: 100%;" type="text"/>
Event Location:	The Union
Date of Event:	00/00/0000

8. Notes Section

- a. If selecting other under Account Code
 - i. add six digit account code and description
- b. If this is an event with multiple meals and/or meals on multiple days for the same event

Notes:	Breakfast 1/1 : Cost per Person \$23 Lunch 1/1 : Cost per Person \$34 Breakfast 1/2 : Cost per Person \$24
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9. Check boxes for Meal Type

<input checked="" type="checkbox"/> Breakfast (\$40 per person)
<input checked="" type="checkbox"/> Lunch (\$50 per person)
<input checked="" type="checkbox"/> Dinner (\$85 per person)
<input checked="" type="checkbox"/> Light Refreshments (\$40 per person)

10. Cost of Meal per Attendee = Total Amount ÷ Number of Attendees

Cost of meal per person :

- a. If multiple meals are being listed on the same form please note the cost of meal per attendee in the notes section above (See Section 8b)

11. Number of Recipients (Only Applicable for Meals)

- a. Total number of persons attending the meal

- i. Check the box next to Small Group if equal to or under 25 (See Page 2 of Hospitality Justification Form)

Number of Recipients

Small group (25 or less - see page 2)

Large group (more than 25 - see below)

- ii. Check the box next to Large group if over 25

- Provide a description of the recipient relationship to campus and use the Cost per Person box if for one meal
 - If multiple meals please use the same example under section 8b

Please provide a description of the group if over 25 people and estimated cost of the meal per attendee in the box below.

25 Students
5 Faculty
30 Community Members
1 Donor

12. Approval Signatures are **REQUIRED** on the form itself

- **Procard Reconciliation is the only exception**

<p>Approval* <i>I certify that I did not attend this event and a manager or above of the official host</i></p> <p>Signature: <input style="width: 90%; height: 25px;" type="text"/></p> <p>Print Name and Title: <input style="width: 90%; height: 25px;" type="text"/></p>	<p>Exception Approval by VP/Provost**</p> <p>Signature: <input style="width: 90%; height: 25px;" type="text"/></p> <p>Print Name: <input style="width: 90%; height: 25px;" type="text"/></p>
<p><small>* Cannot approve your own expenses, events you attended, those of your manager, or events from which you benefit.</small></p> <p><small>** Per person meal exceeded the limit; preapproval alcohol at employee only event; recreational, sporting, or entertainment events; or spouse, domestic partner, or significant other of an employee.</small></p>	

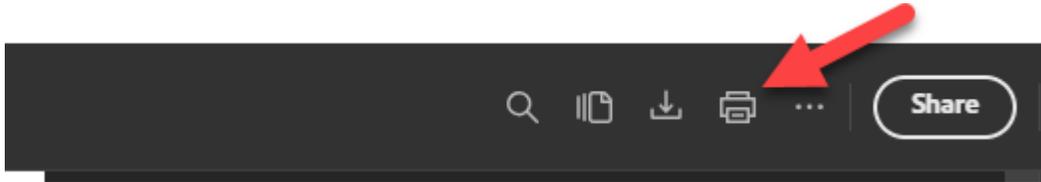
13. **Formatting for Accounts Payable Workflows**

- a. Once the form has been completed please route for signatures from applicable approver(s)
- b. Once the signature(s) are received, BEFORE submitting via Adobe Sign, please flatten the form to retain the signatures using the steps below - **see page 4**
- c. If this is not completed, the request may be declined due to missing approval(s)

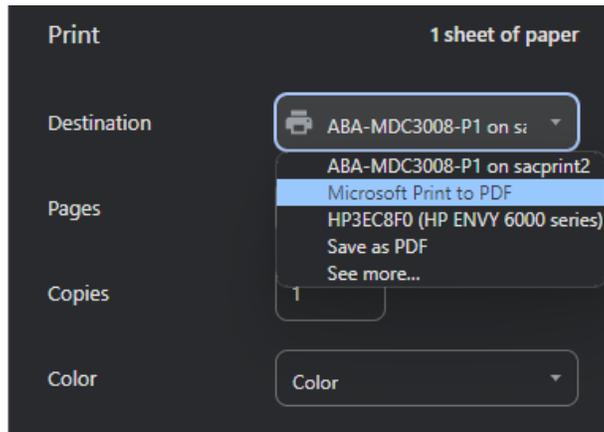
14. **Formatting for Procard Workflow**

- a. Once the form is completed, please flatten the PDF - **see page 4**
- b. This is to avoid any formatting errors due form field errors and size capacity limits
- c. If this is not completed, the statement will not be able to be completed and cause delays in ProCard use

15. How to Flatten the Hospitality Justification Form
 - a. Navigate to the Print Button on Adobe Acrobat or Browser
 - i. If signed it will show the blue ribbon



- b. Under Destination use "Microsoft Print to PDF"



- c. Select Print and Name the File



- d. Reopen to verify complete

Name	Status	Date modified	Type	Size
Hospitality Justification Form.pdf		7/17/2024 11:39 AM	Adobe Acrobat Document	486 KB