



PREAPPROVAL REQUEST FOR PURCHASE AND REIMBURSEMENT

Step 1: Procurement Compliance Review

You may NOT be reimbursed for purchases through awarded vendors who accept purchase orders.

Can this transaction be completed by requesting a purchase order?

Yes

No

If Yes, stop and follow the procurement process for goods or services.

If No, proceed to step 2.

Step 2: Request Approval

Employee Name: _____ ID: _____

Request Date: _____ Organization: _____

JUSTIFICATION FOR EXPENSE: Provide details of need, reasoning, and intended supplier(s)

Four horizontal lines for justification text.

Employee Signature: _____ Date: _____

Step 3: Approval Must be completed by Org Office Manager, Financial Clerk, or Admin. Asst.

Linecode for Expense: _____ - _____ - _____ - _____ - _____ - _____ - _____
Fund Fn Object SObject Org Yr PIC

Funds Available \$ _____ Date Verified: _____ Bookkeeper Initials: _____

Purchase Amount not to exceed: \$ _____

Supervisor Approval: _____ Date: _____

Additional Approval: _____ Date: _____

Organizations may choose to include an Additional Supervisor's Signature or leave blank.

Step 4: Make the purchase and retain your receipts

Step 5: Reimbursement REIMBURSEMENT REQUIREMENTS

To request reimbursement, you must:

- Submit a completed and approved copy of this form via iExpense.
Include itemized, detailed, and dated receipt(s) which must include item descriptions, quantities, costs, and complete purchase location and supplier name.
For food purchases, be sure to complete and include required food compliance forms.