T&E Business Purpose Form

Instructions

What You Should Know

On all Expense Reports — whether the expense is for the purchase of travel, conference registration, meeting supplies or a retirement gift you must provide justification for the purchase. It is essential that reviewers, approving managers, and auditors understand the circumstances under which you made the purchase and why it was necessary.

Your brief, accurate, and complete description of the business purpose should be clear enough that a person outside the organization could read it years from now and have no question about the eligibility of the expense for reimbursement. Expense reports should have this form attached as support in addition to receipts and other appropriate substantiating documentation for each expense. The form should answer the following:

- **Who** attended or received the benefit from the expenditure; business meals also need to include the names and titles of the individuals in attendance or the number of people if the group is more than 10.

- **What** purpose the expenditure served, why the expense was necessary, or how it furthered the Health System or University’s goals

- **When** and **where** the expense took place.

Please note: It is the departmental approver’s responsibility to review and validate the business purpose for each requested reimbursement.

All JHHS reimbursement requests must also comply with FIN022 (Business and Travel Expenses) or other applicable policies.

All JHU reimbursement requests must also comply with the University Travel Guide Policies & Procedures or other applicable policies.

Any questions regarding this form should be submitted to the Accounts Payable Travel and Expense Processing Unit via email at TravelAPSS@jhmi.edu or phone at 443-997-6688.