



College of Public Affairs and Education

UNIVERSITY OF ILLINOIS SPRINGFIELD

Subject: Expense Request Form
Category: Accounting
Effective Date: 05/01/2024
Contact: CPAE Business Administrative Associate

Procedure

- 1.) When CPAE faculty or staff would like to purchase goods or services, an [Expense Request Form](#) must be completed if the purchase is above the budgeted amount for supplies or other budgeted goods, services, and events.
- 2.) The Expense Request Form does NOT need to be completed for faculty development purchases unless the purchases are above the faculty member's available balance(s) (i.e. annual faculty development, University Scholar, Berman Sabbatical Award, etc.)
- 3.) If an Expense Request Form is required, the faculty or staff member making the request must complete [the electronic form](#) including the following information:
 - a. Expense request title
 - b. Date needed by
 - c. Unit
 - d. Expense category
 - e. Suggested CFOP (Optional)
 - f. Description and business purpose (how will this purchase benefit the university)
- 4.) The Form will then be routed to the unit leader for review.
 - a. If the unit leader approves the expense, the form will be routed to the CPAE Business Administrative Associate (BAA) for review.
 - b. If the unit leader rejects the request, the form will be routed back to the requester who can revise and resubmit the request as needed.
- 5.) Once approved by the unit leaders, the BAA will review the request to assess whether there is sufficient funding available in the budget.
 - a. If the BAA determines there is no available funding, the form will be returned to the requester who can revise and resubmit the request as needed.

- b. If the BAA determines there is funding, they will route the request along with a CFOP recommendation to the Dean for their review.
- 6.) The Dean, or Associate Dean in the Dean's absence, will review the request and make the final approval, including CFOP, or denial.
- 7.) If the expense request is approved, the requester, the unit leader, and the unit administrative aide will be notified through email. The requester will then work with the unit administrative aide to make the purchase.