The Food and Beverage Authorization and Payment Form has a variety of uses. Please follow the guide below to determine when to use the form, how to properly complete the form, and who should receive the form once completed. For more information on the event types that qualify for food and beverage purchases please see the Training Materials for Food and Beverage Expenditures.

When to Use the Food & Beverage Form

- **Authorization only and payment will be made through eVA Purchase Order.** Check this box when an eVA requisition will be submitted and a purchase order will be issued to a vendor for the food/beverage purchase. Complete the form, including signatures #2 and #3, and then upload to the eVA purchase requisition. *Check this box for Sodexo orders and dining hall visits, not processed through Catertrax online, and submit to Sodexo*.

- **Authorization only and request for P-Card waiver to purchase food and beverage.** Check this box to request a “lift” on a Purchase Card (P-Card) in order to procure food and beverage directly from a vendor. Note: You do not need a “lift” to purchase food items from a general merchandise store (Giant, Target, etc.); however, policy forbids the purchase of raw meat. Complete the form, including signatures #2 and #3, and then send the request, with attached form, to pcardadm@gmu.edu. Total transaction must be under $2,000. You will receive a response within 2 days.

- **Request for Reimbursement to Payee.** Check this box to request reimbursement to a Mason employee or student for a necessary purchase. Complete the form, including signatures #1, #2 and #3, and then submit the form and receipt to Accounts Payable by email to apforms@gmu.edu. Note: Reimbursements are the least desirable method of payment. Effort should be made to utilize a Mason P-Card or eVA purchase order to reduce out of pocket expenses incurred by the Mason employee or student.

*Do not attach the form to an online Sodexo order. Sodexo online ordering already contains the necessary information to process food and beverage requests. The fund/org and senior approving official (if required) will receive an email from Sodexo for approval.*

How to Complete the Form

1. Check the appropriate option for **Authorization and/or Payment**.
2. Under **Requestor Contact Information** – enter your name, department and phone extension.
3. In the **Total Amount** field, enter the total amount of the purchase. Enter the fund/org to be charged under #1. *To split charges between multiple funds/orgs, use lines #2 - #3 to note the additional fund/org and corresponding amount. Enter an Optional Tracking FB#, if desired, based on interdepartmental procedures.*
4. Under **Vendor/Payee Information** – enter the vendor’s name or payees first and last name and G#. *All vendor/payees must have a G#. Use the G# lookup to find an existing vendor or obtain a Substitute W-9 from the vendor/payee and attach it to the Food and Beverage Form when submitted.*

<table>
<thead>
<tr>
<th>Vendor/Payee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Rachel Dracht</td>
</tr>
<tr>
<td>G# : G00000001</td>
</tr>
</tbody>
</table>

Student and employee reimbursements will be sent via direct deposit or mailed to the individual’s current address in Patriot Web. Please encourage all reimbursement recipient to enroll in direct deposit – instructions are available here: Student Direct Deposit or Employee Direct Deposit. Students and employees may also update their address in Patriot Web to ensure proper mail delivery. Vendors must submit a new Substitute W-9 for address updates.

5. **Student and employee reimbursements will be sent via direct deposit or mailed to the individual’s current address in Patriot Web.** Please encourage all reimbursement recipient to enroll in direct deposit – instructions are available here: Student Direct Deposit or Employee Direct Deposit. Students and employees may also update their address in Patriot Web to ensure proper mail delivery. Vendors must submit a new Substitute W-9 for all address changes.
Food & Beverage Form Instructions

6. Under Event Information – enter the date (m/d/yyyy), location where the event will be held, start time/end time (h:mm am/pm).

7. Enter the number of attendees and maximum per diem/per person. The Estimated Cost will automatically calculate based on your attendee number and per diem entry.

8. Detail the Purpose of the Event. If the event is a Business Function, enter the nature of discussion and why it was necessary for business. (i.e., “Speaker lunch” is not acceptable, you will need to elaborate on why it was necessary for business).

9. AFTER the event, you must update the Actual Cost field to reflect the true cost of the event prior to submitting the form to Accounts Payable for Payee Reimbursement. For P-Card payments, enter the amount charged to the P-Card prior to uploading the form to Bank of America Works.

10. Under Indicate Business Purpose for Event – select the category of event. For Exempt Events under $2,000 within per diem, click on the down arrow and choose the Exempt Event Type.

11. Print form and obtain signatures.
   1) Payee Signatures for Reimbursement – is required when a Mason student or employee is being reimbursed for an out-of-pocket purchase. Sign AFTER event.
   2) Fund/Org Approver – is required to authorize the food and beverage purchase. Sign BEFORE event. *If Payee is the Fund/Org Approver, then the Supervisor must sign.

12. Submit form based on Authorization and/or Payment Type as detailed above.

For assistance with completing a Food and Beverage Authorization and/or Payment Form, please contact jadams15@gmu.edu. For questions on Reimbursement status, please utilize the Payment Inquiry Portal. General questions may be directed to Accounts Payable at ext. 3-2580.