

From: [Villalobos, Marcel A - \(marcel\)](#)
To: ramtalk@list.arizona.edu
Subject: For researchers and administrative teams: Financial Services Memo- Updated Business Purpose Guide
Date: Monday, April 18, 2022 12:58:00 PM
Attachments: [image001.png](#)

Dear Research Community,

Please review the guidance below from Financial Services regarding expense documentation requirements.

Expenditures on sponsored accounts should accordingly follow the guidance, or the transaction may be returned/disapproved. Please note this also applies to cost transfers such as Salary Expense Transfers and General Error Corrections.

Of note from the guidance, *“The Arizona Auditor General has requested that governmental organizations ensure that all disbursement transactions (e.g., supplier invoices, travel authorizations, travel expenses/reimbursements, purchasing card payments, requisitions, internal billing transactions, etc.) have written information within the transaction documentation to justify the public purpose served by the expenditure.”*

Please contact me directly if you have questions about expense documentation on sponsored accounts, or if you would like a customized cost training for your unit or college.

Thank you,
Marcel

Marcel Villalobos
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From: businessoffices-request@list.arizona.edu <businessoffices-request@list.arizona.edu> **On**
Behalf Of Financial Services
Sent: Monday, April 18, 2022 10:29 AM
To: businessoffices@list.arizona.edu
Subject: [businessoffices] Updated Business Purpose Guide

Logo Description automatically generated



To: University Business Offices

From: Tammy Strom, Director, Accounts Payable

Subject: Updated Business Purpose Guide

The [Business Purpose Guide](#) has been updated to enhance and clarify the requirements for a business purpose on all financial transactions, making it easier for users when completing their documentation.

The updates include:

- Revised definition of a business purpose to ensure all expenses are appropriate and serve the goals and objectives of the University.
- Additional verbiage stating a business purpose must be provided on **ALL** financial documents.
- New section containing information regarding the Arizona Auditor General request for written information to justify the public purpose served of an expenditure and Arizona Constitution Article 9, Section 7 regarding public funds.
- Clarified where the business purpose details should be located/documented within UAccess Financials.

This updated reference tool is not reflective of a policy change. We recommend however that approvers, reconcilers, or individuals making purchases or initiating services on behalf of the University review this revised guide to avoid delays in transactions within the financial system.

For questions, please contact Accounts Payable at 520-621-9097 or accts_pay@fso.arizona.edu.