**JD Grants Committee 2023-2024**

***Local Event* Actual Expenses Report**

*Form for 2023-2024 posted on the JD Grants webpage in June 2023*

The Local Event Actual Expenses Report is required even if the Law School prepaid all expenses for the event and no reimbursement is requested. One person must collect the requested information about the event and submit a report. The report must list all expenses, including any submitted by an individual for reimbursement.

The Local Event Actual Expenses Report is due *within two weeks* after the event ends. E-mail the completed report as Word document to [jdgrants@law.wisc.edu](mailto:jdgrants@law.wisc.edu). Do *not* include receipts or other documentation.

**NOTE: If you do not receive all invoices before the two-week deadline, email** [**jdgrants@law.wisc.edu**](mailto:jdgrants@law.wisc.edu) **to request a short extension.**

**General Reimbursement Rules**

**Reimbursement deadline and process:** Reimbursement requests and all accompanying documentation are due *within two weeks* after the event ends. Email electronic documents as attachments to Jennifer Gardner-Brokmeier, the Law School Accountant, and Adam Bushcott, the Main Office Manager, at [jennifer.gardner@wisc.edu](mailto:jennifer.gardner@wisc.edu) and [adam.bushcott@wisc.edu](mailto:adam.bushcott@wisc.edu). For print documents, either scan and attach them to the email *or* deliver them to the Law School’s Main Office on fifth floor.

**Reimbursement for individuals only:** The Law School cannot reimburse student organizations or co-curricular activities because of significant federal tax implications. Expenses incurred on behalf of a student group must be paid by individual members who can then request reimbursement. Reimbursement is allowed only for expenses listed on this report.

**Purchase documentation:** Purchases cannot be reimbursed without proper documentation. Be sure to get a dated, itemized receipt for all purchases that are not prepaid and will not be billed to the Law School. Credit card receipts are not adequate. If you have questions, contact Adam Bushcott at [adam.bushcott@wisc.edu](mailto:adam.bushcott@wisc.edu).

Note: Reimbursement requests are public records. Before submitting receipts, redact your personal mailing address, email address, and phone number if they appear on a receipt.

**Wisconsin sales tax:** Wisconsin sales tax *cannot* be reimbursed. This restriction on sales tax applies to in-person and online purchases such as on Amazon.com. If you did not get the Law School’s tax-exempt number before you made the purchases, you or the student group will have to pay any sales tax listed on the receipts. Also, some vendors will not accept the tax-exempt number, so you or the student group will have to pay that sales tax as well.

**Documentation and Reimbursement for Food Purchases**

Three types of documentation are required for food purchases even when there is no reimbursement request. This documentation is required whether the food service was prepaid by the Law School, will be billed to the Law School, or was paid by an individual who will request reimbursement. When there is a reimbursement request, then four types of documentation are needed.

* Event documentation: The documentation must include who, what, when, and where. Examples include an agenda, program, schedule, or email sent to members.
* List of the people who attended the event: The university requires a list of attendees’ names and affiliations (e.g., student, faculty, speaker, general public). This list should have been generated during the event, with attendees signing the list before receiving their food**.** A list written on any paper is acceptable.
* Law School Business Office – Events – Meal Payment Form: This form is available on the JD Grants website at <https://law.wisc.edu/current/jdgrants/forms.html>. The “Business Purpose” must explain how the event supports or advances the goals, objectives, and/or mission of the organization. Be sure to include sufficient detail.
* Contact information and itemized receipts: In addition, if one or more people need to be reimbursed for food purchases, attach their names, their email addresses, and itemized receipts when submitting the Meal Payment form. In the email, list the amount of the reimbursement request for each person.

**Reimbursement for Non-Food Purchases**

Contact Adam Bushcott at [adam.bushcott@wisc.edu](mailto:adam.bushcott@wisc.edu), and he will tell you what documentation is needed for reimbursement. He will most likely ask you to provide the following information. Additional items or forms may be needed for some purchases.

* The decision letter or email message from the JD Grants Committee approving funding for this event and the non-food purchase. Either your organization’s officers or the person who submitted the event funding request will have the decision letter or email message.
* Event documentation that includes who, what, when, and where. Examples include an agenda, program, schedule, or email sent to members.
* Contact information for the person who is requesting reimbursement.
* Itemized receipts for all expenses to be reimbursed.

**\*\* Please delete these instructions before submitting this form. \*\***

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**\*\* Email the completed report as a Word document**

**to** [**jdgrants@law.wisc.edu**](mailto:jdgrants@law.wisc.edu)**. \*\***

1. **Name of individual, student organization, or co-curricular activity:**
2. **Name of event** (as listed in the JD Grants Committee’s Decision Letter)**:**
3. **Date(s) of event:**
4. **Location of event** (venue in Madison)**:**
5. **Total cost of the event** (from line “A” in question 12)**:**
6. **Total amount approved for this event by the JD Grants Committee** (from the Decision Letter)**:**
7. **Total amount to be paid by the JD Grants Committee** (from line “B” in question 12)**:**
8. **Name of person who completed this report** (with e-mail address and phone number)
9. **Date this report was completed or submitted:**
10. **Number of event participants affiliated with the Law School:**

When possible, list numbers by category (e.g., members of the organization’s board, other students, faculty, and staff).

1. **Number of event participants *not* affiliated with the Law School:**

If possible, list by general categories.

**JD Grants Committee – *Local Event* Actual Expenses Report 2023-2024**

**Question 12:**

* Provide detailed information in this table about all of the expenses incurred for this event.
* Be sure to double-check *all* of the calculations.

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| **Itemized List of Expenses**  Be sure to include all expenses listed on the funding request form. | **Total cost of each item** | **Law School prepaid item?**  **(yes or no)** | **Name of person to be reimbursed or entity\* to be paidfor the item**  **(\*e.g., caterer, venue)** | **Item to be paid by another funding source?**  **(yes or no)** |
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| **Line “A”—TOTAL EXPENSES for this event**  (for question 5) |  |  |  |  |
| ***Minus:***  **total amount to be paid by all other funding sources** |  |  |  |  |
| **Line “B”—TOTAL AMOUNT TO BE PAID by the JD GRANTS COMMITTEE** (for question 7) |  | This number will include (1) all items that the Law School prepaid with JD Grants funds and (2) all items to be reimbursed or paid with these funds. | | |

**13. If the amount to be paid by JD Grants (question 7) exceeds the amount the committee approved for this event (question 6), explain the additional expense(s) in detail.** Any additional expenses will be paid or reimbursed only upon a showing of extraordinary circumstances.

**14.** **List all other funding sources for this event and how much money each one pledged to pay.** (In question 12, you may indicate which funding sources paid for which expenses, but this information is not required by the JD Grants Committee. If the Law School Business Office staff needs to know which funding sources paid for which expenses, someone from that office will contact you.)

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| ***JD Grants Committee Use Only***  Name of event:  Additional expenses (if any) approved:  Additional expenses (if any) denied:  Date Actual Expenses Report received:  Date the approved Actual Expenses Report was sent to the Business Office:  Date person who completed this report was notified that the Actual Expenses Report was received and will be or has been approved:  Signature: Date: |

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