

## Instructions for CBO Prior Entertainment Approval Form in PerfectForms

Note: This form must be used for events if cost per person is more than \$100 or P-card entertainment purchases exceeding \$1000 but less than \$5000

### **Requestor:**

Go here to complete the form: <http://app.perfectforms.com/player.htm?f=rGCiAgUC>

Fill in the top section of the form with the following:

1. box for the purpose of the event
2. the name of the event
3. date of the event
4. number of attendees
5. cost per attendee
6. cost of event
7. the department name
8. the cost center/WBS element
9. GL Code
10. your last name
11. first name
12. email address
13. phone
14. date you completed the form
15. department head EMAIL to whom the form should be submitted

**NOTE:** please indicate if using P-card for payment in the box for purpose of event

**ATTACHING DOCUMENTS:** Only one document can be attached to the form for back-up or additional information about the event, this can be done by clicking on the attach button. If there are multiple documents to be attached you must combine them into one document before attaching, not to exceed 2MB in size.

Click Submit. When the form has been submitted you will receive a confirmation email. As each stage in the approval process is completed, you will also receive an email. If at any time the form is rejected, you should receive an email with the reason included.

After original submission, you may view the form in PDF by following the link in your confirmation email.

The tracking number will be assigned and filled in on the form (upper left-hand corner) after it is submitted. **This number must be entered in the notes section in IRIS when paying your invoice.**

If there are any questions along the way, contact Tammy Wiggs at [twiggs@utk.edu](mailto:twiggs@utk.edu) or at 974-4204.

### **Department Head:**

\*Fill in your name, phone number, and the date if different than the auto date

\*If your department requires the Dean or Vice Chancellor approve the form (before going to the Office of the Vice Chancellor for Finance & Administration) be sure to fill in their email address

\*To approve: click the submit button

\*To reject: fill in a reason for rejection and click the reject button

\*To view the form later, refer to the link in the email

Note: You will receive an email daily Monday – Friday stating that you have a form to approve until you approve or reject the form allowing it to move to the next stage.

### **Dean or Vice Chancellor:**

\*Fill in your name, phone number, and the date if different than the auto date

\*To approve: click the submit button

\*To reject: fill in a reason for rejection and click the reject button

\*To view the form later, refer to the link in the email

Note: You will receive an email daily Monday – Friday stating that you have a form to approve until you approve or reject the form allowing it to move to the next stage.