

# Gift Card Request Form Instructions

The screenshot shows the SAP Concur interface. The 'Requests' tab is circled in red. Below it, the 'New Request' link is also circled in red. A blue arrow points from 'New Request' to the 'Request' form. In the 'Request' form, the 'Request Name' field is circled in red. Below it, the 'Type of Request' dropdown menu is open, and '\*Gift Card Request' is selected and circled in red. Other options in the dropdown include '\*PCard Request', '\*Animal Procurement Form', and 'Materials Management Stores Request'.

Similar to the old paper form found [here](#), all you need to do is complete the fields found in the online form. Under **Request**, click “New Request” and then select “Gift Card Request” from the Type of Request Dropdown box. Complete the fields of the Request Header

The screenshot shows the 'Request Header' section of the form. The 'Request Name' field is filled with 'Payments to Subjects Dr. Research'. The 'Reason for the Purchase' field is filled with 'Incentives for participation in research study of \$25'. The 'What other options have been considered?' field is filled with 'We reviewed cash payments but need cards'. The 'Type of Request' dropdown is set to '\*Gift Card Request'. The 'Name of Requestor' is 'Ginter, Donna'.

Click the Expenses Tab and select the type of payment from the provided account codes:

The screenshot shows the 'Expenses' tab selected. A table lists existing expenses. A red circle highlights the 'Expenses' tab. Another red circle highlights the 'Expense Type' dropdown menu, which is open and shows a list of account codes. The account code '55541-PAYMENTS TO SUBJECTS' is circled in red.

Date	Expense Type	Amount	Requested
05/23/2019	55541-PAYMENTS TO SUBJECTS	\$500.00	\$500.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above existing expense, click the expense on the left side of the page.

- Business Promotions
- Other
- 52612-SPECIAL EVENTS/BUSINESS RELATIONS
- 55541-PAYMENTS TO SUBJECTS
- 52615-EMPLOYEE SPECIAL ACTIVITY
- 52721-PROGRAM DEVELOPMENT ACTIVITY

Answer the questions tied to the purchase of the Gift Cards that will appear once the account type is selected and then click “Save”:

Expense Type 55541-PAYMENTS TO SUBJECTS		Date Cards Needed 05/23/2019	
Name of Gift Card Provider Target		Number of Gift Cards to be purchased 20	
Total Amount of Purchase 500.00 USD		Amount / Gift Card (\$) 25.00	
Method of Payment 1. Pcard			
Are there supplemental charges besides the purchase price? Yes		Are these cards being used for research? Yes	
Oracle Alias (100537) 41837/5/CCLS29490F		Grant/Non Grant (PTA) Grant	
Who are the recipients of the Gift Cards? Research Subjects		Who will be the custodian of the Gift Cards once purchased? PI Researcher	
How will the Gift Cards be Distributed? Electronically once survey is completed		Where will the Gifts Cards be stored? In a safe within the department	
Comment 			
<div>Save Allocate Cancel</div>			

Should you have a purchase that requires a Justification and Approval form or Supplier Selection Memo for any reason, please attach the form and documentation at the top left of the form:

Attachments ▾ Print / Email ▾ Delete Request Submit Request

Status: Not Submitted  
Amount: \$500.00

Are there supplemental charges besides the purchase price? ▾ Yes ▾

Are these cards being used for research? ▾ Yes ▾

Grant/Non Grant  
(PTA) Grant ▾

Oracle Alias  
(100537) 41837/5/CCLS29490F ▾

Who are the recipients of the Gift Cards? ▾ Research Subjects ▾

Who will be the custodian of the Gift Cards once purchased? ▾ PI Researcher ▾

Where will the Gifts Cards be stored?  
In a safe within the department

How will the Gift Cards be Distributed?  
Electronically once survey is completed

Comment

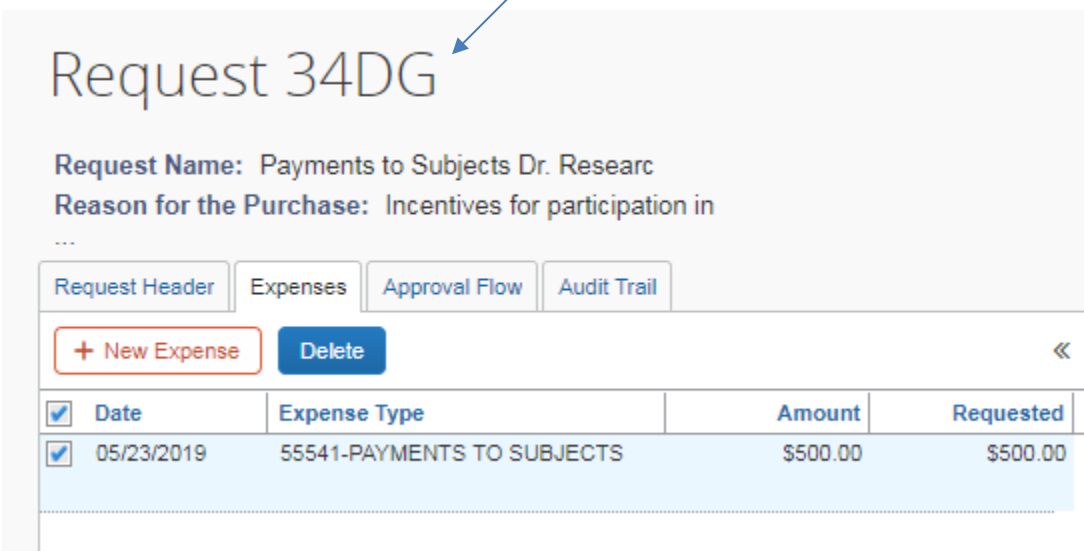
Save Allocate Cancel

If you need to break out the expenses tied to the purchase to separate out any fees (credit card fee and processing fee, etc.) that cannot be billed to the PTA, please add that information within the comments section.

As this is not tied to an actual expense yet, there is no need to allocate the funding.

Once this section is complete, click on the Approval Flow tab”

Note that the system has automatically generated a Request number for these cards. You will be able to search for this request using this ID or by the Request name on the Header Tab.



Request 34DG

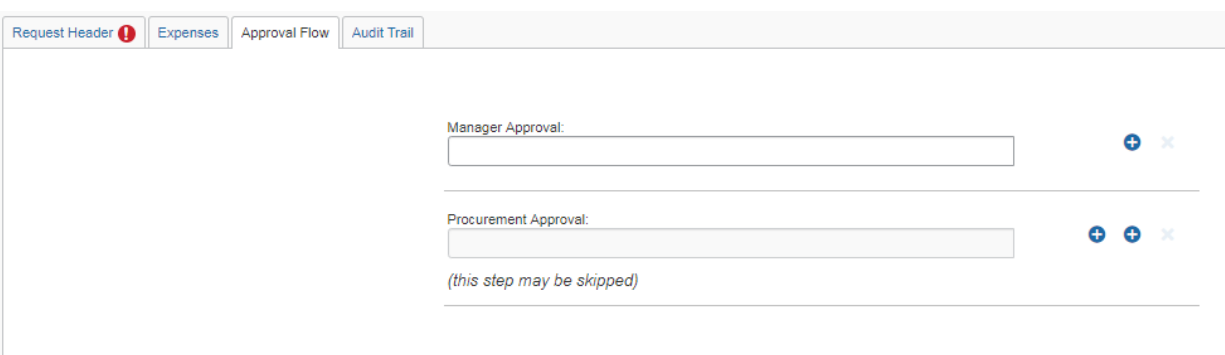
**Request Name:** Payments to Subjects Dr. Research  
**Reason for the Purchase:** Incentives for participation in ...

Request Header | Expenses | Approval Flow | Audit Trail

[+ New Expense](#) [Delete](#) <<

<input checked="" type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	05/23/2019	55541-PAYMENTS TO SUBJECTS	\$500.00	\$500.00

Under the Approval Flow tab, “just let it flow” - If it normally goes to your Financial Director, it will. No additional individuals should be inserted. Remember this is being purchased on a pcard and/or requisition and they have their own reviews separate from or after purchase (via an expense report).



Request Header | Expenses | Approval Flow | Audit Trail

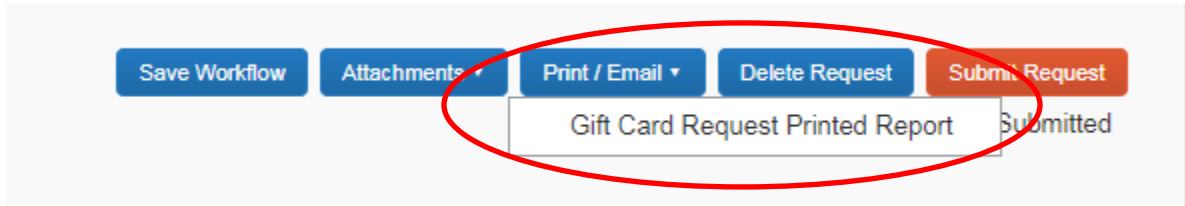
Manager Approval:  
 [+](#) [x](#)

Procurement Approval:  
 [+](#) [+](#) [x](#)

*(this step may be skipped)*

Once approved, you can reference the Request number in your expense report, and attach a copy of the request to your transaction along with the receipt.

To get a pdf of the Request Form, simply click on Print/Email and select “Gift Card Request Printed Report”



Your report will look like the screenshot below with all the details. Save it as a pdf for upload into Concur.



Final document/request looks like this:

Gift Card/Cash Equivalent Approval Form																
Request ID : <b>33Y3</b>																
Approval Status : <b>Approved</b>																
Employee Name : <b>McKenzie, John P.</b>																
Employee ID : <b>G28623517</b>																
Email Address : <a href="mailto:jmckenzie@gwu.edu">jmckenzie@gwu.edu</a>																
Country of Residence : <b>UNITED STATES</b>																
*GWU-Org Unit 1-Grant Indicator : <b>Non-Grant</b>																
*GWU-Org Unit 2-Home Org : <b>GW CANCER INSTITUTE</b>																
Request Policy : <b>*Gift Card Request</b>																
Name : <b>Avon Study Interviews - Amazon</b>																
*Grant Indicator : <b>Non-Grant (GL)</b>																
*Home Org : <b>GW CANCER INSTITUTE (GL-830062)</b>																
Purpose : <b>The DC Metro LGBTQI Community Advisory Board recommended gift cards for this study. Incentives provide the best results and Amazon (or CVS or equivalent) have worked well with past studies and are flexible to use.</b>																
*Custom 12-Lab Contact Name and Ext : <b>Submitted prior to change.</b>																
Expenses																
Expense Type	Transaction Date	Vendor Name	*Custom 02-Quantity/Number	*Custom 04-Estimated Unit Price	Amount	Amount	Approved Amount	*Custom 03-UOM	Custom 11-Are there supplemental charges besides the purchase pr	*Custom 09-Yes No List	*Custom 06-Grant/Non Grant	*Custom 07-Oracle Alias	*Custom 08-Gift Card Recipient List	*Custom 01-Supplier Item #	*Custom 10-Where will the gifts cards be stored	Entry Description
55541-PAYMENTS TO SUBJECTS	04/15/2019	Amazon	28	\$125.00	\$3,250.00	\$3,250.00	\$3,250.00	1. Pcard	No	Yes	Grant	39927/3/ECNS21658N	Research Subjects	John McKenzie	Lockbox in office	Either physically at on site events or electronically via email