**Lehigh University OneCard Program**

**Entering Business Purpose in the Description Field**

OneCard users should use the description field to enter business purpose in such a manner that to any reader the business purpose is valid, supports the University’s mission and is directly related to official University business. Business purpose should answer the following: **Who?** (If other than cardholder or out-of-pocket user) **What? Why? When? Where?** (If this information is not printed on the receipt)In some cases some of those questions are answered on other parts of the statement. Listed below are a few examples of what can be listed for business purpose.

**Examples of business purpose to put in “Description” field:**

\*\* **How to Fix the Health Care Crisis Conference San Diego CA May 3 to 6** \*\*

…You don’t need a “why” as conferences and seminars are all considered professional development

\*\* **Dinner with Harvard Professor Joe Ivy at How to Fix the Health Care Crisis Conference to discuss collaboration on plan to fix the health care crisis** \*\*

…You don’t need a “when” or “where” if it is on the receipt

\*\* **Dinner with Economics Professor John Doe and CEO of the Biggest Corporation in America John Smith who spoke at How to Fix Our Economy Seminar sponsored by Lehigh** \*\*

*…*You don’t need a “when” or “where” if it is on the receipt

\*\* **Recruitment dinner with faculty candidate Mary Smith and Bob Jones Ann Miller and Susan Smith all Chemical Engineering faculty** \*\*

…You don’t need a “when” or “where” if it is on the receipt

\*\* **Travel to Oxford United Kingdom to meet with John Windsor professor at University of Oxford regarding research on William Shakespeare Jan 15 to 20** \*\*

**\*\* Communication equipment or data usage plans for (*cardholder or out-of-pocket user must provide a valid business purpose here*)** \*\*

*…*You don’t need a “who”, “when” or “where” if those questions are answered on the statement

\*\* **Supplies for (*pick what applies*) office operations, teaching, research, student activities, conference sponsored by Lehigh** \*\*

…You don’t need a “who”, “when” or “where” if those questions are answered on the statement

**Examples of what is not a sufficiently descriptive business purpose):**

\*\* Breakfast, Lunch, Dinner, Hotel, Tolls, Parking, Tips \*\*

\*\* Cell phone \*\*

\*\* Pens, pencils, paper \*\*

**Tips for entering business purpose in the description field:**

* Don’t use symbols or punctuation marks. The Wells Fargo System will not let you use a variety of symbols or punctuation marks so just don’t use any at all.
* If you want to use the same business purpose in all the description fields, when you are looking at your statement, click on “Select All” on the upper left of the screen and then click on the “Reclassify” box at the bottom of the screen. On the next screen that appears, type the business purpose in the “Description” box and then click on “Apply to All” located below the box. An example of when you would be likely to do this is when you have numerous expenses for the same conference.
* You can also copy and paste a business purpose from one description box to another.

**Please refer to the Travel and Business Policy and Procedures located on the Controller’s Office website for additional information on business purpose**