Create a Special Expense Form

DEPARTMENT OF ADMINISTRATION
Online Electronic Inter Office Requisition (Training)

Navigation: Click on Create

Fields marked with an * are required fields. All other fields are optional.

1. Type of Purchase from drop down selection: Select the Special Expense Form
2. EIOR Title: Enter title of your special expense – be as specific as possible
3. Previous PO# (or EIOR#): If there’s a previous Purchase Order (PO) or referencing an existing EIOR
4. Date PO Needed: The date is populated based on EIOR creation date with a three day lead time – update if needed.
5. Price Obtained by: Select the appropriate option based on how price was obtained
6. Fiscal Year: The Fiscal Year (FY) will be populated based on the current FY
7. Contract No (if known): Enter if applicable
8. Agency/Division: Select the appropriate selection. Available options will be based on User ID
9. Ship To: Select the appropriate option
10. Bill To: Select the appropriate option
11. Will there be multiple ship to addresses? Select the appropriate option
12. Supervisor Approver: Select the requester’s supervisor or appropriate option
13. Creator Comments: Enter any notes in the comments field

Click on **Next** to proceed with creation of the EIOR or **Cancel** to delete the EIOR.
If you click on Next to proceed, this will create an EIOR with an assigned EIOR number.

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**Enter Item Information** - Click on **Add Items** to enter EIOR details:

![Add Items](image)

**Enter EIOR Item Details:**

Fields marked with an * are required fields. All other fields are optional, but should be answered if applicable.

![Item Information](image)

1. Expenses for which approval is requested: Select the appropriate responses for questions 1 through 10.
2. Expenses for which approval is requested: Select the appropriate responses for questions 1 through 3.
3. Sponsor: Enter if applicable
4. Name of Event: Enter specific event information
5. Location of Event: Enter event location
6. Dates/Times of Event: Enter the dates and times of the event
7. Employee Name and Title: Enter the employee name(s) and Title(s)
8. Explain why the State should pay these expenses: Enter the justification for the expense
9. **Description of Expense:** Enter details of expense item and amount
10. **Est. Unit Cost:** Enter 0.00 – this amount will always be 0.00
11. **Notes:** Enter notes if applicable

Click on **Submit** to save and proceed with creation of the EIOR or **Cancel** to delete data entered and return to previous section on the EIOR.

**Buying Information Section:**

1. **Shipping/Freight Total:** Enter if applicable
2. **Tax Total:** Enter if applicable
3. **Credit Card/Purchasing Card Used:** Select appropriate option, if applicable
Vendor Section:
1. Targeted Vendor Contacted: Select appropriate option
2. Targeted Vendor Selected: Select appropriate option
3. Suggested Vendors: Enter a recommended Vendor ID
4. HTML Link/Other: Enter website link or other data, if applicable
5. Contact Person: Enter if applicable
6. Phone: Enter if applicable
7. Fax: Enter if applicable
8. Street Address: Enter if applicable
9. City: Enter if applicable
10. State: Enter if applicable
11. Zip: Enter if applicable

Ship to Section:
1. Requestors Phone: Enter appropriate telephone number

Click **Update** to save and **Finish and Send** to submit the EIOR for supervisor approval and processing.
To review the submitted EIOR and status, the Requester can click on the My EIOR link. Click on the EIOR ID in the Submitted EIORs section.

The Work Flow section located on the right side of the EIOR will display the Approvals required and status. As the EIOR is updated and approved the date and will be populated with the current date and timestamp.