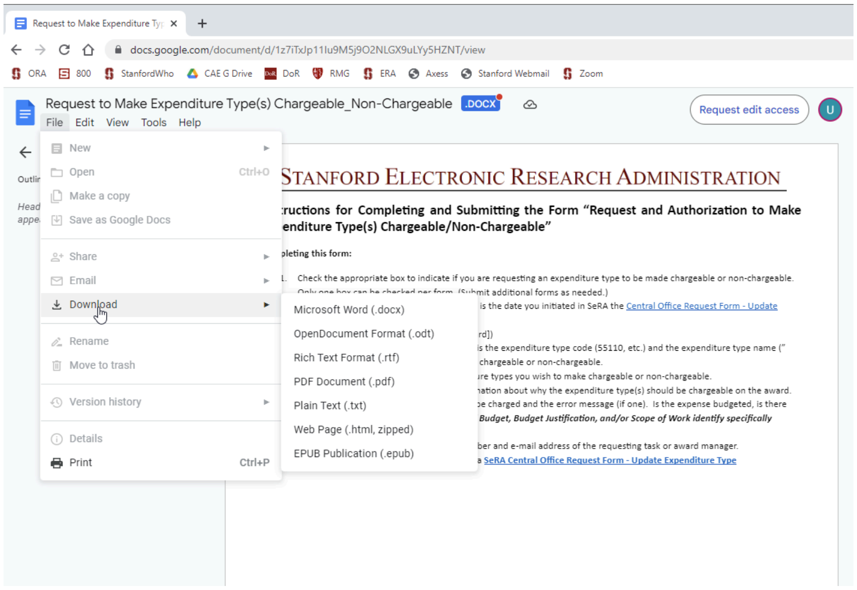
Instructions for Completing and Submitting the Form “Request and Authorization to Make Expenditure Type(s) Chargeable/Non-Chargeable”

Completing this form:

1. Download this document and make edits on the version you have downloaded.



2. Check the appropriate box to indicate if you are requesting an expenditure type to be made chargeable or non-chargeable. Only one box can be checked per form. (Submit additional forms as needed.)
3. Enter the date requested (MM/DD/YY). This is the date you initiated in SeRA the [Central Office Request Form - Update Expenditure Type]
4. Enter the relevant PTA ([Project]-[Task]-[Award])
5. Enter the Expenditure Type Requested. This is the expenditure type code (55110, etc.) and the expenditure type name (” Supplies Gen Office”, etc.) you want to make chargeable or non-chargeable.
6. ***6.*** - (8) Use these fields for additional expenditure types you wish to make chargeable or non-chargeable.
7. **Justification** (**CRITICAL**) – Enter a brief explanation about why the expenditure type(s) should be chargeable on the award. Document the specific expense that cannot be charged and the error message (if one). Is the expense budgeted, is there re-budgeting authority, etc.? ***Attach copy of Budget, Budget Justification, and/or Scope of Work identify specifically expense(s) is/are requested.***
8. Enter the Name (First, Last), Telephone Number and e-mail address of the requesting task or award manager.
9. **9.** Attach the completed **page 2** of *this* form to a **SeRA Central Office Request Form - Update Expenditure Type**

STANFORD ELECTRONIC RESEARCH ADMINISTRATION

Request to Make Expenditure Type(s) Chargeable / Non-Chargeable

Please read the instructions to this form before you start

Submit completed form as an attachment to a: SeRA Central Office Request Form - Update Expenditure Type

This form serves as the request to make non-chargeable Expenditure Type(s) chargeable or to make chargeable expenditure types non-chargeable. This form is submitted by the Award or Task Managers only.

1. **Make Expenditure Types Chargeable** ☐ **Make Expenditure Types Non-Chargeable** ☐
   Check only one of the boxes above. If you need to make exp types chargeable and non-chargeable submit separate forms.

2. **Date Requested:** ________
3. **PTA Affected:** ________
4. **Exp Type Requested:** ________ **Exp Type Name:** ________

List additional ETs below.

5. **Exp Type Requested** ________ **Exp Type Name:** ________
6. **Exp Type Requested** ________ **Exp Type Name:** ________
7. **Exp Type Requested** ________ **Exp Type Name:** ________
8. **Exp Type Requested** ________ **Exp Type Name:** ________
9. **Justification (Please fully describe how the expenditure type(s) requested above are allowed on the award.)**

10. **Requested By Award/Task Manager**

Print Name (First/Last)	Telephone # / E-mail

OFFICE OF SPONSORED RESEARCH USE ONLY:

Approved By OSR: ☐
Rejected By OSR: ☐
(Check appropriate box.) **Print Name (First/Last)** **Date**

Reason for Rejection:

Oracle Updated:

Print Name (First/Last)	Date	Telephone # / E-mail

Note: All expenditures charged to the sponsored awards are subject to sponsors' terms and conditions. Authorization of this request does not automatically grant approval of the charges. Charges are subject to OSR review.