

Gift Card Request Form Instructions

The main purpose of this form is to submit a request for gift card purchases. In order to use this form, your profile must be complete. Take a moment to go to your profile at the top of the page and confirm your home and work address, phone and cell phone (under add mobile device) are listed. See also important [Step by Step](#) written instructions.

Log into GW iBuy+ - Login using your netid and password.

Select the **Requests** menu tab, then click **New Request**.

The screenshot displays the SAP Concur web interface. At the top, a dark navigation bar contains the 'SAP Concur' logo and several menu items: 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', 'App Center', and 'Locate'. The 'Requests' menu item is highlighted with a red circle. Below this bar, a secondary navigation bar includes 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The 'New Request' link is also circled in red. A blue arrow points from the 'New Request' link to the 'Request' form below. The form has a title 'Request' and buttons for 'Cancel', 'Save', and 'Print'. It features a 'Request Name:' section with tabs for 'Request Header', 'Segments', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is selected and circled in red. Within this tab, a 'Type of Request' dropdown menu is open, showing options: '*PCard Request', '*Gift Card Request', '*PCard Request', '*Animal Procurement Form', and 'Materials Management Stores Request'. The '*Gift Card Request' option is highlighted with a red circle. A blue arrow points from this option to the 'Request Name' field in the form. Other fields in the form include 'Name of Requestor' (containing 'Ginter, Donna'), 'Request Name', and 'My User Profile Complete?' (with a question mark icon).

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

Request

Request Name:
Reason for the Purchase:

Request Header | Expenses | Approval Flow | Audit Trail

Type of Request: *Gift Card Request
 Name of Requestor: Ginter, Donna

Request Name: Payments to Subjects Dr. Researc
 Reason for the Purchase: Incentives for participation in research study of \$25
 What other options have been considered?: We reviewed cash payments but need cards

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

Request Header | **Expenses** | Approval Flow | Audit Trail

+ New Expense | Delete

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	Amount / Gift Card (\$) 25.00
Total Amount of Purchase 500.00	Method of Payment 1. Pcard	
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

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:

The screenshot shows a web form interface. At the top right, there are four buttons: 'Attachments' (circled in red), 'Print / Email', 'Delete Request', and 'Submit Request'. Below these buttons, the status is 'Status: Not Submitted' and the amount is 'Amount: \$500.00'. The main form area contains several sections:

- Supplemental Charges:** 'Are there supplemental charges besides the purchase price?' (Yes), 'Are these cards being used for research?' (Yes), and 'Grant/Non Grant' (PTA) Grant.
- Oracle Alias:** (100537) 41837/5/CCLS29490F
- Gift Cards:** 'Who are the recipients of the Gift Cards?' (Research Subjects), 'Who will be the custodian of the Gift Cards once purchased?' (PI Researcher), and 'Where will the Gifts Cards be stored?' (In a safe within the department).
- Distribution and Comments:** 'How will the Gift Cards be Distributed?' (Electronically once survey is completed) and a 'Comment' text area.

At the bottom right of the form are three buttons: 'Save', 'Allocate', and '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. Researc
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

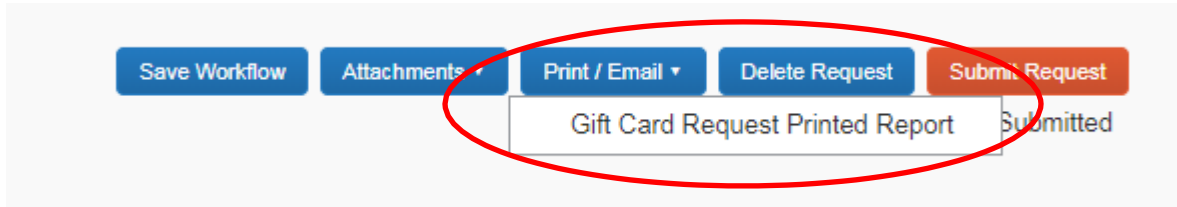
Manager Approval: + x

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 : 33Y3 Approval Status : Approved																
Employee Name : McKenzie, John P. Employee ID : G28623517 Email Address : jmckenzie@gwu.edu Country of Residence : UNITED STATES *GWU-Orig Unit 1-Grant Indicator : Non-Grant *GWU-Orig Unit 2-Home Org : GW CANCER INSTITUTE																
Request Policy : *Gift Card Request Name : Avon Study Interviews - Amazon *Grant Indicator : Non-Grant (GL) *Home Org : GW CANCER INSTITUTE (GL-430042) Purpose : 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. *Custom 12-Lab Contact Name and Ext : Submitted prior to change.																
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 05-Yes No List	*Custom 06-Grant/Non Grant	*Custom 07-Oracle Alias	*Custom 08-Card Recipient List	*Custom 09- Supplier Item#	*Custom 10- Where will the gift cards be stored?	Entry Description
55541- PAYMENTS TO SUBJECTS	04/15/2019	Amazon	26	\$125.00	\$3,250.00	\$3,250.00	\$3,250.00	1. Pcard	No	Yes	Grant	390270/ECONS21658N	Research Subjects	John McKenzie	Lockbox in office	Either physically at on site events or electronically via email