

Software and AI Subscription Reimbursement Request

ECE Concur Reimbursement Request Form

Complete this form and attach all supporting documentation before ECE begins preparing the Concur report. The claimant is responsible for the accuracy of the information and for responding directly in Concur to BFS comments about the facts or circumstances of the expense. Select annual billing when reasonably available and team, group, or enterprise billing when multiple users need access.

A. Requestor and Funding Information

Subscriber / primary user *

UCSB email *

Responsible faculty member / PI

Proposed Project (FRU.Fund.Project) *

B. Subscription and Business Purpose

Vendor *

Product or service *

Product category - select all that apply *

- | | | | |
|--|---|--|---------------------------------------|
| ☐ AI tool | ☐ Software | ☐ Cloud platform | ☐ Data service |
| ☐ Research tool | ☐ Publication / database | ☐ Storage service | ☐ Other |

Specific University business or research purpose *

Who will use the subscription? - select all that apply *

- | | | | |
|---|---|---|-------------------------------------|
| ☐ One individual | ☐ Research group / lab | ☐ Course / instructional group | ☐ Department |
| ☐ Other | | | |

List all individual users who access this subscription - BFS requires each user's full first and last name *

Does UCSB already provide access to this product or a comparable product? - select one *

- | | | |
|------------------------------|-----------------------------|---------------------------------|
| ☐ Yes | ☐ No | ☐ Unsure |
|------------------------------|-----------------------------|---------------------------------|

If yes or unsure, briefly explain why a separate subscription is needed

C. Supporting Documentation

Confirm the documents included with this request *

- | | |
|--|---|
| ☐ Itemized invoice or receipt | ☐ Proof of payment |
| ☐ Subscription terms showing the billing period | ☐ Vendor pricing or plan comparison, when relevant |
| ☐ Other supporting documentation | |

Supporting-document link or submission notes

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D. Billing, Account Ownership, and Renewal

Subscription start date *

End / renewal date *

Total subscription cost *

Billing frequency - select one *

☐ Annual

☐ Monthly

☐ Quarterly

☐ Other

Is an annual billing option available? - select one *

☐ Yes

☐ No

☐ Unsure

Was annual billing selected? - select one *

☐ Yes

☐ No

☐ Not applicable

If annual billing was not selected, briefly explain

Is a team, group, or enterprise billing option available? - select one *

☐ Yes

☐ No

☐ Unsure

If multiple users need access, was a shared plan selected? - select one *

☐ Yes

☐ No

☐ Not applicable

If a shared plan was not selected for multiple users, briefly explain

Automatically renewing? - select one *

☐ Yes

☐ No

☐ Unsure

Registered with a UCSB email? - select one *

☐ Yes

☐ No

Person responsible for renewal and cancellation *

Vendor account email address *

Can the account be transferred if the current user leaves UCSB? - select one *

☐ Yes

☐ No

☐ Unsure

E. Payment Information

Who paid for the subscription? *

Payment date *

Amount requested for reimbursement *

Why was the subscription personally purchased rather than paid directly by the University? *

Certification

- ☐ The subscription is necessary for University business or research.
- ☐ Annual billing was selected when reasonably available, and a shared plan was selected when multiple users need access and it is practical.
- ☐ I am responsible for account access, invoices, renewals, and cancellation.
- ☐ I have provided complete and accurate information and supporting documentation.
- ☐ I will respond directly in Concur to BFS comments concerning the facts or circumstances of the expense.
- ☐ ECE staff will not manage the vendor account, retrieve invoices, monitor renewals, cancel the subscription, or draft factual responses on my behalf.

Claimant / Traveler Name *

Date *