

Instructions for Completing the Special Morale and Welfare Funding Request Template for the NAF AO

1. Add in the email address for the installation SM&W POC before publishing.
2. **“Description of Event”** - This block should give you the information needed to complete the “For Whom/Guest of Honor (Rank/Grade, Name)” block on the SM&W Expenditure Report.
3. **Date** – This is the date the document is being submitted for processing.
4. **Control No.** – You can utilize control numbers to track all of the SM&W requests being processed.
5. **Under Event Specifics, Place** – This is where the event is being held.
6. **Under Event Specifics, Date** – This is the date of the event. This is included on the SM&W Expenditure Report under Date of Event.
7. **Number of Attendees** – Non-DoD includes any people who are not employed by the federal government, contractors, retired military, etc. This information is included on the SM&W Expenditure Report under Number of Attendees – Non-DoD/Non-Federal Government.
8. **Number of Attendees** – DoD Personnel includes anyone employed by the federal government to include active duty military, guard and reserve on duty, civilians (both NAF and APF). This information is included on the SM&W Expenditure Report under Number of Attendees – DoD/Federal Government.
9. **For Whom, Guest of Honor** - This is who the event is being held for. It may be the incoming commander, visitors being hosted by the installation commander, a base-wide newcomer’s orientation, Quarterly/Annual Award winners, promotees, etc. These are listed by name unless there are too many to list and then an attachment is provided. The full name (first and last), the rank or grade, title if non-military, and the unit/office symbol. All blocks must be completed. This goes in the “For Whom/Guest of Honor and Unit/Office Symbol” on the SM&W Expenditure Report.
10. **Description, Quantity, Unit Price and Total Price** – This information is included in the SM&W Expenditure Report under “Specific Description/Quantity of Items/Services Purchased.” This should be self-explanatory and include all of the items purchased. Light refreshments are authorized. *Light Refreshments – Coffee, tea, punch, soft drinks, desserts, snack type items (chips and dips), cheese and crackers and fruit/vegetable trays. The following do not qualify as light refreshments: alcoholic beverages of any kind, meats, complete meals, buffets, banquets, smorgasbords, heavy hors d’oeuvres (any foods which consist of meat, poultry, fish or cheese filled items).
11. **Total** – The dollar amount requested for expenditure. This is included on the SM&W Expenditure Report in the “Total Cost” column. Change of Command authorized amounts are squadron level \$200, group level \$300, and wing level \$500. Retirements authorized amounts are \$50.
12. **Name and Grade of the requesting Officer** – This is the individual who is the POC for this event. All signatures should be digital.
13. **Section II** – This is the block for the Comptroller Squadron to complete. The individual should be well versed in both the APF and ORF areas. This individual needs to check off whether it is or isn’t authorized with APF or ORF and then sign with a digital signature.

14. **Section III** – These blocks show a recommended approval or disapproval for the request, the rule(s) that authorize the expenditure and the category where the expenses should be recorded. This is then signed by the RM or designee with a digital signature.

15. **Section IV** – This area is for the force support commander or designee for approving SM&W expenditures to sign by checking either the approved or disapproved block and signing with a digital signature.

16. **Office Use Only** – This area is to identify whether reimbursement is being made as a transfer to another NAF facility for catering, by petty cash through a cashier cage, or by Electronic Funds Transfer (EFT). Forward the EFT form and the SM&W Request Template to the SSC as supporting documentation to the Disbursement Request processed via NAFDIS. Identify/indicate the specific rule applicable to the transaction/event and actual amounts being reimbursed (refer to AFI 34-201 Table 12.1 for appropriate rules). This will put all of the information on a single document for reconciling/balancing purposes.