

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

CME/Professional Development	SOP #: FIN.006.04
Effective Date	4/29/16
Last Revision/Review	11/17/21, 4/28/23, 5/31/24, 6/4/25

1. Purpose

This policy is to further enhance the 'BCOM Travel and Entertainment SOP FIN.018.00' policy and define parameters of CME/Professional Travel versus General Business Travel and the associated expenses that BCOM is requested to reimburse for. Travel expenses will be reasonable and necessary while an employee is traveling on official BCOM business away from their work location. Typically, an employee pays for travel costs and seeks reimbursement from Burrell College after returning from the trip. All travel should be planned and conducted in a manner that reflects prudent use of college resources.

2. Related Policy/Authority

Policy B3011 Fiscal Management

3. Faculty/Staff Responsibilities

CFO is responsible to ensure that an overall structure of sound internal controls is implemented, GAAP is followed in all accounting, and that all external regulations and requirements for cash transactions are addressed in the control and reporting structure. CFO is responsible to periodically review the structure and implementation of disbursement controls.

The Controller is responsible for the implementation and oversight of these procedures.

4. Definitions/Abbreviations

CME = Continuing Medical Education

Professional development (aka professional education) = meetings or seminars that emphasize education in specific professional career field emphasizing praxis in addition to the transfer of skills and theoretical academic knowledge found in education.

Travel associated with Continuing Medical Education (CME)/Professional Development is for educational purposes, usually selected by Faculty, to obtain or maintain a license or professional certification.

Travel associated with business activity that directly benefits BCOM is classified as Business Travel versus CME/Professional Development; usually the employee is asked to attend this meeting or training by his/her Department Head or by the Dean.

5. Procedural Steps

Qualifying Professional Development Expenditures:

- Professional conferences that are relevant to the faculty member's subject matter expertise. To include:
 - Conference registration fees

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- Travel expenses
 - Accommodations and meals
 - Membership fees or dues to relevant organizations or societies
 - Books, journals, articles relevant to the faculty member's subject matter expertise
1. Faculty members may use their designated CME/Professional Development travel budget to cover eligible expenses, including conference registration and associated travel costs. Questions regarding travel or leave balances should be directed to the faculty member's Department Head, who has access to a spreadsheet tracking individual leave and travel allocations.

Faculty are responsible for documenting CME/Professional Development travel by completing a Travel Requisition Form, available at <https://burrell.edu/finance/finance-forms/>. If the actual cost of attending a CME event exceeds the individual's available travel budget, the faculty member is responsible for covering the excess with personal funds.

2. Employee Business Travel
Travel to participate in business activities that directly benefit Burrell College is Business Travel. The employee is asked to attend this meeting or training by his/her Department Head or the Dean. The employee is responsible for noting Other Business Travel on the Travel Requisition Form.
3. Each faculty/employee is required to complete a Travel Requisition form [\[https://burrell.edu/finance/finance-forms/\]](https://burrell.edu/finance/finance-forms/) and obtain their direct supervisor's approval prior to making a trip or making travel arrangements. The Travel Requisition form is to include the purpose for the travel, dates of travel, location and estimate of costs (*refer to the Travel and Entertainment SOP FIN.018.00 for further detail on allowable costs*). The Dean will approve or disapprove the Travel Requisition form. The faculty/employee's reporting Department Head will inform the employee whether the travel is approved or disapproved.
4. An employee is expected to plan and make appropriate travel arrangements at least 14 days before departing on an overnight trip. Proper planning will permit the employee to shop for the most economical means of transportation and inexpensive accommodations.

6. Reports/Charts/Forms/Attachments/Cross References

N/A

7. Maintenance

Office of the Controller; updated whenever an external reporting requirement is added or changed.

8. Signature

Approved by
CFO

6.6.2025
Date

9. Distribution List

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Internal/External

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
11.17.2021	5	Updated titles and added information about CME Professional Development		11.30.2021
4.28.2023	5	Updated information about the VP of Administration roles.		4.28.2023
5.31.2024	4	Defined Professional Development		6.4.2024
5.31.2024	5	Updated roles		6.4.2024
5.31.2024		Replaced acronym of BCOM with Burrell College		6.4.2024
6.4.2025	1	Updated information regarding travel cost		6.6.2025
6.4.2025	5	Updated faculty's CME/Professional Development travel guidelines		6.6.2025
6.4.2025		Updated Vice President of Administration/CFO to CFO		6.6.2025