

# **BURRELL COLLEGE OF OSTEOPATHIC MEDICINE**

## **STANDARD OPERATING PROCEDURES**

<b>Travel and Entertainment</b>		<b>SOP #: FIN.018.02</b>
Effective Date	9/27/17	
Last Revision/Review	Reviewed 12/21/18 8/28/19, 11/19/21, 4/28/23	

### **1. Purpose**

To establish the BCOM Travel Program, including policies and procedures for authorizing, reporting and reimbursing business-related travel and entertainment expenses (also referred to as “reimbursable expenses”).

To ensure all employees and contractors have a clear and consistent understanding of policies and procedures for business travel and entertainment.

To maximize BCOM’s ability to negotiate rates with suppliers and reduce travel expenses.

### **2. Related Policy/Authority**

Policy B3011

### **3. Faculty/Staff Responsibilities**

Vice President of Administration/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 routine business transactions are addressed in the control and reporting structure. The VP of Administration/CFO is responsible to periodically review the structure and implementation of internal controls.

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

### **4. Definitions/Abbreviations**

None

### **5. Procedural Steps**

Travel to participate in business activities that directly benefit BCOM is Business Travel. The employee is asked to attend this meeting or training by his/her supervisor or Department Head. The employee is responsible for noting Other Business Travel on the Travel Requisition Form.

An employee is required to complete a Travel Requisition form [<https://burrell.edu/finance/finance-forms/>] and obtain the Department Head’s and Dean’s approval prior to making a trip or making travel arrangements. The Travel Requisition form is to include the department, account number, requestor’s information, purpose for the travel, dates of travel, location and estimate of costs. The Travel Requisition form is required to be filled out and approved 7-10 business days prior to traveling.

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Once the Travel Requisition form is approved, the employee may proceed to:

### **1. Registration Fee**

- The requester or the departments' designated administrative assistant is responsible for their registration arrangement.
  - If registration needs to be paid in advance by BCOM, contact Accounting Technician in the Finance office.
  - If requester makes their own payment arrangement, BCOM will reimburse the traveler's expenses after the travel. An Expense Reimbursement Report must be completed and submitted along with original receipts.

### **2. Airfare**

- The requester or the departments' designated administrative assistant is responsible for their flight arrangement. BCOM will pay the cost of commercial airline travel, at the lowest available rate that meets the business needs. Employees are required to provide an airline itinerary for all airfare.
  - If airfare needs to be paid in advance by BCOM, contact the travel agency who BCOM conducts business with (contact the Finance office for more information).
  - If requester makes their own payment arrangement, BCOM will reimburse the traveler's expenses after the travel. An Expense Reimbursement Report must be completed and submitted along with original receipts.

### **3. Lodging**

- The requester or the departments' designated administrative assistant is responsible for their hotel arrangement. Travel reimbursement will be at the actual cost of lodging where BCOM has negotiated rates (contact the Finance office for more information). If travel plans must be changed it is the responsibility of the traveler to contact the lodging provider that have been scheduled and cancel reservation.
  - If registration needs to be paid in advance by BCOM, contact Accounting Technician in the Finance office.
  - If requester makes their own payment arrangement, BCOM will reimburse the traveler's expenses after the travel. An Expense Reimbursement Report must be completed and submitted along with original receipts.

### **4. Vehicle Use**

- The requester or the departments' designated administrative assistant is responsible for any vehicle rental arrangements.
  - Requester will make their own payment arrangement. BCOM will reimburse the vehicle rental expense after the travel. An Expense Reimbursement Report must be completed and submitted along with original receipts.
  - Rental cars should be at the economy car rental rate.
- Employees electing to use a personal vehicle for approved business travel should refer to SOP FIN.014.

### **5. Meals**

- The requester or the departments' designated administrative assistant is responsible for submitting an Expense Reimbursement Report along with original itemized receipts to the Finance office.

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- Employees will be reimbursed for breakfast, lunch and dinner expense, including customary gratuities according to reasonable and actual cost, when traveling on company business.
6. Other costs
- The requester or the departments' designated administrative assistant is responsible for any other additional arrangement.
    - Requester will make their own payment arrangement. BCOM will reimburse any additional expenses after the travel. An Expense Reimbursement Report must be completed and submitted along with original receipts.

Please complete a BCOM Expense Reimbursement Report form to request reimbursement. Expenses resulting from an employee's non-official or personal activities, such as optional pre- or post-conference recreational activities or entertainment fees, and expenses related to personal guests of the employee cannot be reimbursed.

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

Travel Requisition Form and BCOM Expense Reimbursement Report :

[Burrell College of Osteopathic Medicine – Finance Forms \(burrell.edu\)](http://burrell.edu)

### **7. Maintenance**

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

### **8. Signature**

Approved by

VP Administration/CFO

4/28/2023

Date

### **9. Distribution List**

Internal/External

### **10. Revision History**

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Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
11.19.2021	5	Updated links and completing the expense reimbursement.		12.1.2021
4.28.23		Updated titles and references		4.28.23