

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

Travel and Entertainment		SOP #: FIN.018.05
Effective Date	9/27/17	
Last Revision/Review	Reviewed 12/21/18 8/28/19, 11/19/21, 4/28/23, 5/24/24, 6/4/25, 7/18/2025	

1. Purpose

To establish the Burrell College 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 Burrell College’s ability to negotiate rates with suppliers and reduce travel expenses.

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 routine business transactions are addressed in the control and reporting structure. The 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

e-Requestor = Purchase requisition front end system which submits approved requisitions and related transactions to GP. The Purchase Requisition and the Purchase Order are both created in e-Requestor and uploaded to GP.

5. Procedural Steps

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 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 Their direct supervisor’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 Burrell College, a purchase requisition is to be created in e-Requester per the process in SOP Fin.016.
 - If requester makes their own payment arrangement, Burrell College will reimburse the traveler's expenses after the travel. An Expense Reimbursement Requisition is to be completed in e-Requester and submitted along with itemized receipts.

2. Airfare

- The requester or the departments' designated administrative assistant is responsible for their flight arrangement. Burrell College 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 Burrell College, contact the travel agency who Burrell College conducts business with (contact the Finance office for more information).
 - If requester makes their own payment arrangement, Burrell College will reimburse the traveler's expenses after the travel. An Expense Reimbursement Requisition is to be completed in e-Requester and submitted with itemized 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 Burrell College 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 Burrell College, contact either the Controller or Associate Controller in the Finance office.
 - If requester makes their own payment arrangement, Burrell College will reimburse the traveler's expenses after the travel. An Expense Reimbursement Requisition is to be completed in e-Requester and submitted with itemized 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. Burrell College will reimburse the vehicle rental expense after the travel. An Expense Reimbursement Requisition is to be completed in e-Requester and submitted with itemized receipts.

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o 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 department's designated administrative assistant is responsible for submitting an Expense Reimbursement Requisition in e-Requester with itemized receipts.
- Employees will be reimbursed for actual and reasonable meal costs when traveling on College business, up to a total daily maximum of \$70.00. The following per-meal amounts are provided as guidelines to assist with planning and consistency:

Meal	Suggested Reimbursement Guideline
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Breakfast	\$15.00
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Lunch	\$20.00
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Dinner	\$35.00
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Total Daily Limit \$70.00

- Gratuities of up to 20% may be included in the reimbursement amount, provided the total for each meal remains within the stated limit.
- Alcoholic beverages will not be reimbursed unless specifically approved in writing by the President or Dean of the College.
- If any meals are provided by the event or conference employees are not eligible to claim reimbursement for those meals.
- Meal reimbursement is only permitted when:
 - o Travel includes an overnight stay, or
 - o College business requires an employee to be away from their primary work location for the majority of the workday, including over a normal meal period.
- When submitting receipts that include expenses for additional employees or business guests, the names and affiliations of all individuals must be clearly noted in the reimbursement request. The per person amount should not exceed the approved maximum reimbursement amounts.
- Any reimbursement requests that exceed the total daily limits must be accompanied by a written justification and must receive prior written approval from the President, Dean, or Chief Financial Officer (CFO). Overages without proper approval will not be reimbursed.

Team Meals and Internal Travel Between Locations

- The College recognizes the value of shared meals to support collaboration and morale when staff or faculty are traveling between the College's two official work locations.

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- When employees from one campus travel to the other for official College business, reasonable group or “team” meals may be reimbursed, including participation by local employees.
- Team meals must:
 - Be pre-approved by the Budget Owner (a person with “budget authority”)
 - Include a business purpose (e.g., team-building, strategic planning, interdepartmental coordination)
 - Remain within the \$70 per person daily maximum, inclusive of any individual and team meals combined
 - When submitting receipts that include expenses for multiple individuals (employees or guests), the per-person total should not exceed the daily maximum. The reimbursement request must clearly identify:
 - Each attendee’s name and affiliation
 - The business purpose of the meal

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. Burrell College will reimburse any additional expenses after the travel. An Expense Reimbursement Requisition is to be completed and submitted with itemized receipts.

An Expense Reimbursement Requisition is to be submitted through e-Requester for expenses within 14 days after return from travel.

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.

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8. Signature

Approved by CFO	7.18.25 Date
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9. Distribution List

Internal/External

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
11.19.21	5	Updated links and completing the expense reimbursement.		12.1.2021
4.28.23		Updated titles and references		4.28.23
5.31.24		Update BCOM to Burrell College		6.5.2024
5.31.24	4	Added e-Requester		6.5.2024
5.31.24	5	Updated procedures to include e-Requester processes		6.5.2024
6.4.25	5	Updated meals expense policy		6.6.25
6.4.25		Updated Vice President of Administration/CFO to CFO		6.6.25
7.18.25	5	Updated meals expense information and team meals		7.22.2025