

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

CME/Professional Development		SOP #: FIN.006.01
Effective Date	4/29/16	
Last Revision/Review	11/17/21	

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 BCOM after returning from the trip. Minimizing travel costs paid by BCOM is the primary goal of this policy.

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 cash transactions are addressed in the control and reporting structure. The VP of Administration/CFO is responsible to periodically review the structure and implementation of cash management procedures and controls, and to regularly review all cash reports presented to the Ownership, the Board, the Debt Trustee, and any governmental agency or accrediting body.

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

4. Definitions/Abbreviations

CME = Continuing Medical 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

1. Faculty's CME/Professional Development Travel:

Faculty's CME travel budget will be utilized to pay for associated conference registration and travel expenses. Faculty should direct inquiries about his/her travel or leave budget to their reporting Department Head, who should have access to a spreadsheet that shows faculty's leave and travel balances. The faculty is responsible for noting CME/Professional Development travel on the Travel Requisition form [<https://burrell.edu/finance/finance-forms/>].

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If actual travel costs for attending a CME conference or event exceeds the faculty's travel budget, then faculty will pay for the excess expenses with personal funds.

2. **Employee Business Travel**

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 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 the Dean'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 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. Also, prior planning will achieve the primary purpose of this policy: to minimize travel costs paid by BCOM.

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

VP Administration/CFO

11/17/21

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
11.17.2021	5	Updated titles and added information about CME Professional Development		11.30.2021