I. POLICY STATEMENT

This policy on the reimbursement for business meals and the purchase of food services is intended to define the conditions under which the University will pay directly or reimburse employees for meal expenses while not in an approved travel status.

II. PURPOSE OF THE POLICY

The purpose of this document is to describe allowable meal and food service purchases using University funds while not in an approved travel status.

III. APPLICABILITY AND IMPACT STATEMENT

This policy addresses UMBC faculty, staff and guests engaging in business meals that utilize University funds. This Policy does not apply to reimbursement for meals as a result of travel (see Travel Policy available on Financial Services web site).

IV. CONTACTS

Direct any general questions about this University Policy first to your department’s administrative office. If you have specific questions, call the following office:

<table>
<thead>
<tr>
<th>Subject</th>
<th>Contact</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Clarification</td>
<td>Business Services</td>
<td>410-455-3638 or</td>
</tr>
<tr>
<td></td>
<td>Department in Financial Services</td>
<td>410-455-3632</td>
</tr>
</tbody>
</table>

V. UNIVERSITY POLICY

A. Reimbursement and Purchase

1. University funds may be used to reimburse meal costs and/or for the purchase of food services where necessary and reasonable, when business is being conducted on behalf of UMBC.

2. Use of University funds must follow procedures as outlined below.

3. UMBC will reimburse individuals or pay for actual expenses incurred for meals as defined in VI. DEFINITIONS with the applicable approval per VII APPROVAL AND PROCEDURES.

4. Meal reimbursement for non-University employees will be reimbursed for the actual cost of the meal as defined in VI. DEFINITIONS with the approval by the applicable Vice President or Dean per VII, B. 2. below.
B. Documentation:

1. All business meal reimbursements and purchases are to be documented as referenced in this policy and related procedures; the form of required documentation will differ between a department and an individual (see VIII DOCUMENTATION below).
2. Individuals requesting payment and/or reimbursement for a meal must complete and submit the documentation noted in VIII. DOCUMENTATION.

VI. DEFINITIONS

<table>
<thead>
<tr>
<th></th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Business Meal (A)</td>
</tr>
<tr>
<td>B</td>
<td>Catered Meal (B)</td>
</tr>
<tr>
<td>C</td>
<td>Restaurant Meal (C)</td>
</tr>
<tr>
<td>D</td>
<td>Working Meal (D)</td>
</tr>
<tr>
<td>E</td>
<td>Committee Meal (E)</td>
</tr>
<tr>
<td>F</td>
<td>Recruitment Meal (F)</td>
</tr>
<tr>
<td>G</td>
<td>Training Meal (G)</td>
</tr>
<tr>
<td>H</td>
<td>Events Meal (H)</td>
</tr>
<tr>
<td>I</td>
<td>Other Meals (I)</td>
</tr>
<tr>
<td>J</td>
<td>University Funds (J)</td>
</tr>
</tbody>
</table>
VII. APPROVAL AND PROCEDURES

A. Pre-approval is required for (i) all Catered Meals and/or (ii) any meal consumed at or purchased from an on site or off site facility attended by only UMBC employees. The Meal/Food Pre-Approval form must be completed and approved by the appropriate supervisor PRIOR to the meal occurring or a caterer engaged as follows:

1. If the cost of the meal is under $2,500, the Meal/Food Pre-Approval form must be completed and signed by a Director, Department Chair or higher.

2. If the cost of the meal is from $2,500 up to, but not including $5,000, approval is required by an Assistant or Associate Vice President, Assistant or Associate Dean, Assistant or Associate Vice Provost, or higher.

3. If the cost of the meal is $5,000 or greater, approval is required by a Vice President, Dean, Provost or higher. (Note: Catered events of $5,000 or more, require a competitive procurement unless the University has a contract in place for such purchases.)

In addition, for catered events, a requisition for a Purchase Order in PeopleSoft must also be processed with the signed Meal/Food Pre-Approval form provided to Procurement, unless the P-card can be used as identified by the Office of Procurement.

B. Approval for reimbursement for any business meal and/or restaurant meal not included above in A, requires the UMBC Travel/Miscellaneous Personnel Reimbursement form to be completed and approved by the appropriate supervisor as detailed in A.

1. Meal costs shall only be reimbursed to an employee if they are reasonable and appropriate, as determined and approved by the supervisor, and if appropriate original detailed receipts are included; a detailed receipt is defined to be one which includes a listing of the items purchased and the associated unit/line item cost.

2. Reimbursement to a non-university employee is handled as noted in VII. B. 1. above and also requires the approval by the applicable Vice President or Dean.

Note: For Shared Governance Groups, the supervisor, who is to provide approval under VII A and B above, is the designee identified by the President’s Office.
C. **Payment/Reimbursement:**

1. For situations in which a Purchase Order (PO) was issued, the approved “Meal/Food Approval Form” must be submitted to the Procurement Office with the requisition in order for the PO to be issued. The appropriate receipt should then be entered in the Purchase Order System in PeopleSoft by the applicable department.

2. When the meals have been paid for with cash or personal credit card, original detailed paid receipts must be submitted to Business Services, with an approved UMBC Travel/Miscellaneous Personnel Reimbursement form available on the Business Services web site. If the meal included only UMBC employees per A. above, the “Meal/Food Pre-Approval Form” must be included with the completed expense report.

3. When the meals have been purchased using the D-Card or P-card, the department must maintain adequate and detailed documentation for audit verification purposes. (See VIII B. below for further details).

VIII. **DOCUMENTATION**

A. **Individual Employee Reimbursement Documentation:**

It is the responsibility of each employee to complete the applicable form(s) and to provide adequate and detailed documentation to be eligible for reimbursement and/or to obtain approval for food purchases. The applicable documentation includes the following:

1. Meal/Food Pre-Approval Form, if applicable;
2. UMBC Travel/Miscellaneous Personnel Reimbursement form inclusive of the purpose of the meeting/event and list of attendees; and,
3. Detailed receipt (with “detailed” as defined in VII, B. 1. above).

B. **Departmental D Card and P-Card Documentation:**

It is the responsibility of each department to maintain its D Card log and P-card log with adequate and detailed documentation. The applicable documentation includes the following:

1. Meal/Food Pre-Approval Form, if applicable;
2. Description of the purpose of the meeting/event and list of attendees; and,
3. Detailed receipt (as defined in VII, B. 1. above).

The forms (UMBC Meal/Food Pre-Approval form and UMBC Travel/Miscellaneous Personnel Reimbursement form) can be found on UMBC’s web site at:

IX. RESTRICTIONS AND EXCLUSIONS

A. University funds cannot be utilized for any social functions or activities such as holiday parties, retirement parties, birthday parties, showers, welcome or farewell parties, office parties, etc.

B. University funds cannot be used to reimburse meals that consist only of internal UMBC employees during the normal workday unless such meals meet the criteria outlined in section VI. DEFINITIONS and are pre-approved per VII, A. above.

C. University funds shall not be used to purchase alcohol.

X. RELATED ADMINISTRATIVE POLICIES AND PROCEDURES

A. Departmental Card Policy (available from Campus Card Office)

B. Purchasing Card Program Policy Users Guide (available on the Procurement website)
Meal/Food Pre-Approval Form

Not for meals related to travel

This form is required for business meal/food reimbursements and purchases for (i) catered meals and (ii) meals/food purchases attended by only University employees as indicated in 08-14.00.01-Policy on Reimbursement for Business Meals and Purchase of Food Services.

Requestor: ___________________________ Department: ___________________________

Date of Meal/Purchase: ________________ Estimated/Actual Cost: ______________________

Chartstring To Be Charged: __________________________________________________________

Will The D-Card Be Used? ☐ Yes ☐ No  Will The P-Card Be Used? ☐ Yes ☐ No

Type of Meal (please check one): ☐ Breakfast ☐ Lunch ☐ Dinner

Purpose/Reason for Meal (please check appropriate box and provide more detailed information below. Refer to policy # 08-14.00.01 for explanation of each category):

☐ Working Meal ☐ Committee Meal ☐ Recruitment Meal ☐ Training Meal
☐ Event Meal ☐ Other Meal

Description of Purpose (or attach meeting agenda):________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Participants: (please attach additional sheet if necessary)

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This form must be signed by the appropriate person per VII-11.10.01-Policy on Reimbursement for Business Meals and Purchase of Food Services.

Direct Supervisor Name:_________________________ Title:____________________________

Direct Supervisor Signature: ___________________________ Date:______________________

Approval Name: _________________________________ Title: __________________________

Approval Signature: ___________________________ Date:____________________________

(<$2500 = Director, Department Chair, or higher; $2500 - $4999.99 = Asst/Assoc Vice President, Asst/Assoc Dean, Asst/Assoc Vice Provost, or higher; $5000 + = Vice President, Dean, Provost, or higher)