Policy Title: Staff, Faculty and Administrators Reimbursement

Policy Number: EC.00.04.180102

Applies to: Faculty, staff and administrators with appointments of 0.5FTE or greater

Date: 1/2/2018

1.0 **Policy Statement:**
It is the Elson S. Floyd College of Medicine (ESFCOM) policy to reimburse eligible employees for college-related, pre-approved, and documented expenses related to employment per schedule as announced annually by the Dean’s Office, contingent on available funds.

2.0 **Definitions**

*Eligible Employees:* Faculty, staff and administrators performing college-related duties.
*College-related Duties:* Related to completing job duties and in support of carrying WSU appointment as stated in offer letter and approved in annual budget. Examples include but are not limited to: representing the College at national or international meetings, professional development, certification and professional society memberships, development and continuing education necessary to maintain licensure or certification, as required for the WSU job function, etc.
*Pre-approved and documented expenses:* All expenses covered per this policy need to comply with the process for approval and documentation established by the ESFCOM Business Services Office. This policy is not intended to be applied to the use and management of sponsored research funds.
*Heads of Departments and Offices:* The highest budgetary authority for a given department or office.

3.0 **Responsibilities**

*Dean:* Will decide what funding levels will be made available annually coinciding with the WSU budget process.
*Heads of Departments and Offices:* Will have oversight of their area’s allocated funds.
*Approvals:* Approval will be by the supervisor of the area or department dependent upon the role for which the request is submitted in support of. Heads of departments and offices requests will be reviewed and approved by the Dean.
*Traveler/Beneficiary:* Each employee requesting expense reimbursement must follow the processes, documentation and timelines for expense reimbursement as established by the Business Services Office.
4.0 Procedures

4.1 In accordance with the planning and budgeting calendar for each fiscal year, the Dean will establish and communicate the funds available for employee reimbursement annually.

4.2 In accordance with the planning and budgeting calendar for each fiscal year, responsible supervisors will document any approved professional developmental plans, in accordance with annual review process outcomes.

4.3 In preparation for any travel, a Pre-Travel Request should be completed at least four weeks before travel. The form should be signed by the individuals’ supervisor indicating that the cost of the travel is budgeted for and approved.

4.4 In accordance with the planning and budgeting calendar for each fiscal year, eligible employees will submit their estimate of annual expenses covered by this policy to the respective heads of departments and offices using the estimating template provided in their monthly budget reports.

4.5 In accordance with the planning and budgeting calendar for each fiscal year, heads of departments and offices will develop and submit their annual budgets to include the items covered in this policy to the college Associate Dean for Finance, Administration and Strategy.

4.6 In accordance with the planning and budgeting calendar for each fiscal year, the Associate Dean for Finance, Administration and Strategy will facilitate the review, revision and obtain the Dean’s approval of the College’s annual budget to include the items covered by this policy.

4.7 Beginning with each fiscal year, eligible employees will be informed of approved budget and expenses covered by this policy.

4.8 As needed, eligible employees shall identify non-budgeted expenses covered by this policy and request the approval for these additional expenditures from their head of department or office who in turn will seek the Dean’s approval if needed.

4.9 Faculty and professional staff within one week of return shall submit expense reimbursement documentation for all properly incurred expenses covered by this policy in accordance with University expense reporting policies, Business Policies and Procedures Manual (BPPM) 95.20 and 30.45. The Financial Services team will update the monthly budget report to reflect the actual cost of the activity.

4.10 Beneficiaries of this policy should plan and schedule the dissemination of lessons learned, sharable materials, and professional networking contacts as appropriate after attending national forum and professional development events per Guideline for Dissemination of ESFCOM Funded Activities G.EC.01.170530.
5.0 Related Policies

Washington State University Business Policies and Procedures Manual (95.01, 95.20 and 30.45)

Guidelines for Dissemination of ESFCOM Funded Activities G.EC.01.170530.

6.0 Key Search Words

Travel, Fees, Memberships, Reimbursement, Expenses

7.0 Revision History

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Responsible Office: Vice-Dean for Administration, Accreditation and Finance

Policy Contact: James Zimmerman, James.zimmerman@wsu.edu

Supersedes: N/A