Policy Title: Staff, Faculty and Administrators Reimbursement

Policy Number: EC.00.04.180102

Applies to: All faculty, staff and administrators with appointments of 0.50 FTE or greater

Date: 05/07/2024

1.0 Policy Statement:
It is Washington State University’s Elson S. Floyd College of Medicine (COM) 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 must comply with the process for approval and documentation established by the Elson S. Floyd College of Medicine Business Services Office. This policy is not intended to be applied to the use and management of sponsored research funds.

Reasonable Time: The IRS has defined the reasonable time being within 60 days from when the expenses are paid or incurred. WSU will use the trip end date and the date the claimant signed the Expense Report to determine if this requirement is met.

Budget Manager: The highest budgetary authority for a given department or office. Budget managers are responsible for ensuring that the expenses of the accounts managed do not exceed the unit’s allocated budget. (e.g., supervisors, department chair, vice dean).

3.0 Responsibility

Senior Director of Finance and Operations

4.0 Procedures

4.1 In accordance with the planning and budgeting calendar for each fiscal year, the Dean establishes and communicates the funds available for employee
reimbursement annually, coinciding with the WSU budget process.

4.2 In accordance with the planning and budgeting calendar for each fiscal year, responsible Budget Managers (e.g., supervisors, department chair, vice dean) document any approved professional development plans, in accordance with annual review process outcomes and goals.

4.3 In preparation for any travel that includes either airfare and/or out of state travel, a Spend Authorization (SA) is to be completed at least two weeks before travel. The SA is to be approved by the employee’s supervisor via Workday before any travel-related expenses are accrued, serving as confirmation that the travel costs have been budgeted for and granted approval.

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

4.5 In accordance with the planning and budgeting calendar for each fiscal year, department chairs and administrative heads develop and submit their annual budgets to include the items covered in this policy to the College of Medicine Senior Director of Finance and Operations.

4.6 In accordance with the planning and budgeting calendar for each fiscal year, the Senior Director of Finance and Operations facilitates the review and necessary revisions and obtains the Dean’s approval of the college’s annual budget to include the items covered by this policy.

4.7 Eligible employees are informed of the approved budget and expenses covered by this policy at the beginning of each fiscal year.

4.8 Prior to incurring, eligible employees identify non-budgeted expenses covered by this policy and request their supervisor’s approval for these additional expenditures, securing the Dean’s approval, if needed.

4.9 Within one week of return from travel, faculty and staff 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 College of Medicine’s Business Office financial services team updates 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, shareable materials, and professional networking contacts as appropriate after attending national forum and professional development events.

5.0 Related Policies
Washington State University Business Policies and Procedures Manual (Section 95.00 and 30.45)

6.0 Key Search Words
Travel, Fees, Memberships, Reimbursement, Expenses
7.0 Revision/Review History

Original Approval Policy number 1/2/2018 EC.00.04.180102

Review/Revision 12/20/2019 05/07/2024