

Buying Meals or Light Refreshments for Meetings

NOTE: The website URL for **Workday reference guides** that are referenced in this section is:
<https://confluence.esg.wsu.edu/display/WKB/Workday>

INTRODUCTION

The purchase of meals or light refreshments for meetings is subject to state and University regulations.

Exception

Procedures in this section apply to purchases made with all University monies except for discretionary accounts in function FN057. See *BPPM 70.33* to make purchases using a function FN057 discretionary account.

NOTE: Sponsored accounts may have additional restrictions regarding the purchase of food for meetings.

Conditions for Meals

University monies may be used to pay for meals without regard for participants' travel status or the Eleven-Hour Rule (see *BPPM 95.06*) if the following conditions are met:

- The meal must be essential to the completeness (i.e., an integral part) of an official University meeting or training session, **and**
- The University must *require* that the employee attend the meeting or formal training session, **and**
- The purpose of the event must be to conduct official WSU business or to provide formal training to WSU employees.

Nonallowable

The cost of meals may not be supported by University monies when the purpose of the meeting is to conduct one of the following kinds of activities:

- Normal daily business of University employees
- Staff meetings
- Anniversaries of units
- Anniversaries of individual employment.
EXCEPTION: Such events which are a part of an official employee recognition program approved by the University and HRS may be supported by University monies.

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Nonallowable (cont.)	<ul style="list-style-type: none">• Retirements• Elections• Lobbying a legislator or governmental official• Social events• Election celebrations
Cost Per Meal	<p>Cost per meal served may not exceed the applicable travel meal limits for the location. See <i>BPPM</i> 95.19 for travel meal rates.</p> <p>Enter the applicable cost per meal on the Request to Serve Food form. (See form instructions under Prior Approval.)</p>
Location	<p>The meeting must be <i>away</i> from the employee's regular workplace. (See <i>BPPM</i> 95.01 for a definition of workplace.)</p>
Conditions for Refreshments	<p>Light refreshments include nonalcoholic beverages and edible items commonly served between meals, but not intended to substitute for meals, e.g., coffee, soft drinks, doughnuts, sweet rolls, fruit, cheese.</p> <p>University monies may be used to support the costs of light refreshments, subject to the following conditions:</p>
Purpose	<p>The purpose of the meeting must be to conduct official WSU business or to provide formal training to WSU employees. The light refreshments must be essential for the completeness (i.e., an integral part) of an official University meeting or training session.</p>
Nonallowable	<p>The cost of light refreshments may not be supported by University monies when the purpose of the meeting is to conduct one of the following kinds of activities (see also <i>SAAM</i> 70.15.20):</p> <ul style="list-style-type: none">• Normal daily business of University employees• Staff meetings• Anniversaries of units

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Nonallowable (cont.)

- Anniversaries of individual employment.
EXCEPTION: Such events which are a part of an official employee recognition program approved by the University and HRS may be supported by University monies.
- Retirements
- Receptions for employees
- Elections
- Lobbying a legislator or governmental official
- Social events
- Election celebrations

PRIOR APPROVAL

A Request to Serve Food form is required to obtain prior approval to pay for meals or light refreshments. The responsible chair, director, or approving officer must sign the request at least *five working days before* the event. (See also *SAAM* 70.15.30.)

The Request to Serve Food form is available in PDF format on the Procedures, Records, and Forms (PR&F) website at:

policies.wsu.edu/prf/index/forms/

The requirement also applies to purchases from WSU service centers.

A Request to Serve Food form may *not* be required for certain funding types. For details, see the Accounts Payable website, Food Matrix at:

acctspay.wsu.edu/food-matrix

List of Attendees

The request form must include a list of participants, indicating each participant's relationship to the University, e.g., employee, official, guest.

NOTE: When seeking approval for *refreshments*, this list may include the names of the participating organizations or groups when the number of participants is large or when the names of participants are unknown.

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State Facility Indicate whether a state of Washington facility is to be used for the event. State regulations require that state facilities be given preference when possible. (*SAAM* 10.10.55) See *BPPM* 95.06 for information about conferences and conventions.

Routing The department must attach a copy of the completed and approved request form to the invoice or invoice voucher and submit a Create Supplier Invoice Request in Workday. See the Workday Create Supplier Invoice Request reference guide.

For procurement card transactions, the department retains the completed Request to Serve Food form with the monthly procurement card reconciliation.

PAYMENT OR REIMBURSEMENT

A department may directly pay the supplier or reimburse an employee for incurred food expenses.

Requesting Reimbursement

When an employee personally pays for a meal or light refreshments, submit an Expense Report in Workday. See the Workday Create Expense Report reference guide. Include the following documents:

- An itemized receipt from the supplier.
- A completed and approved State of Washington Invoice Voucher, if the employee was not in travel status, approved by the supervisor to Accounts Payable. See *BPPM* 30.45. (If the supervisor does not have expenditure authority for the charged account, an employee holding the appropriate expenditure authority also signs the Invoice Voucher.)

See *BPPM* 95.06 and 95.20 regarding travel-related meal reimbursements.

Direct Deposit

A WSU employee may authorize Accounts Payable to deposit their food reimbursement in any domestic bank that is a member of an automated clearinghouse. See *BPPM* 95.21 to request direct deposit.

Direct Supplier Payment

The department may pay a supplier directly by using a Purchase Order, Internal Service Delivery, procurement card, or Supplier's Invoice.

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Purchase Order	Create a Purchase Order in Workday. Follow procedures in <i>BPPM</i> 70.07 and the Workday Create and Change Purchase Order reference guide.
Internal Service Delivery	<p>Create an Internal Service Delivery in Workday if the supplier is a University organization, e.g., Dining Service, CUB. Follow procedures in the Workday Internal Service Delivery reference guide.</p> <p>NOTE: An Interdepartmental Requisition and Invoice (IRI) may be used by personnel that do not have access to Internal Service Delivery in Workday. See <i>BPPM</i> 70.05.</p>
Procurement Card	<p>Use a departmental procurement card. Follow procedures in <i>BPPM</i> 70.08.</p> <p>NOTE: A procurement card may not be used to purchase meals that include alcoholic beverages, or to purchase drinking water where potable water is available.</p>
Supplier's Invoice	<p>Obtain an invoice for the meals or refreshments from the supplier. If the supplier's address and name is not on the invoice, complete a State of Washington Invoice Voucher and obtain the supplier's signature on the form.</p> <p>NOTE: A University purchasing form is not required for this procedure.</p> <p>Submit the supplier's invoice in Workday through the Create Supplier Invoice Request. See the Workday Create Supplier Invoice Request reference guide. A University employee with expenditure authority for the supporting account must sign the invoice.</p> <p>NOTE: The total cost may not exceed the current purchasing bid limit. See <i>BPPM</i> 70.13.</p>