

Food Requisition and Justification Form

This form must be completed for any on- or off-campus event whenever reimbursement is requested for food when not traveling - Review UW System Guidelines for documentation requirements: <http://www.uwsa.edu/fadmin/meetguid/appa.htm>

For assistance, contact Accounting at #2334 for policy questions, or Dining at #3463 for food ordering

Date of Event	<input type="text"/>	Time of Event	<input type="text"/>	Requesting Department	<input type="text"/>
Name of Event	<input type="text"/>			Account To Be Charged	<input type="text"/> - <input type="text"/> - <input type="text"/> - <input type="text"/>
Location of Event	<input type="text"/>			<i>Example</i>	(128) (0) (859704) (2161)
Requested By	<input type="text"/>			Acct Admin Name (<i>print</i>)	<input type="text"/>
Phone #	<input type="text"/>			Signature of Acct Admin	<input type="text"/>
Purpose of Event	<input type="text"/>			Reservation #	<input type="text"/>

From Dining Services

- Check One:
 - Food will be purchased from UW Stout Dining Services - *continue on*
 - Food will not be purchased from Dining Services and reimbursement will be requested - *continue on*
- Check One:
 - Food will be paid for from a University account (233 accounts are University accounts) - *continue on*
 - Food will NOT be paid for from a University account (Stout Foundation and Agency accounts are not University accounts) - *return form to Dining Services if food provider. Stop here. Form is complete*
- Check One:
 - Participants pay a fee which covers the cost of the food. - *Attach a brochure / registration form for documentation and return form to Dining Services - Form is Complete*
 - Participants do not pay a fee which covers the cost of the food - *continue on*
- Check One:
 - This event is mainly for UW System Employees (includes students in pay status) - *continue on*
 - This event is mainly for non-employees of UW System - *continue on*
- Check all the types of services that apply.
 - Refreshment** (Limit to \$5/person/break - 1 Morning and 1 Afternoon break is allowed)
Please check the reason why the refreshment is necessary - *you must select one.*
 - Facilities are not available within the building or immediate area of the meeting where attendees could obtain and consume normal break items within a typical break period of 10 to 20 minutes.
 - Having the attendees leave the meeting room would have an adverse effect on the continuity of the meeting; i.e. the break items are expected to be consumed while the business meeting/program continues.
 - Majority of attendees are not UW / State Employees
 - Meal** (Limits: Breakfast - \$8.00 Lunch - \$10.00 Dinner - \$20.00/person (July 1, 2013 or after)
Please check the reason why a meal is necessary - you must select one.
 - A mealtime speaker is scheduled.
 - Business is being conducted during the meal that could not be effectively conducted without a meal
 - Facilities are not available near the meeting location for the attendees to eat at their own cost.
 - Meal costs for athletic pre-game meals (*attach roster*)
 - Meal costs for athletic recruiting per conference and/or NCAA regulations.
 - Reception**
This is allowable for a gathering of individuals associated with a UW-sponsored event that provides the opportunity for interaction in a setting that is not purely social in nature. Unlike a business meeting, a reception may not have a specific agenda or time frame. Like a business meeting, the purpose must be related to or promote the mission of the hosting department.
(*Examples of activities when state funds cannot be used: Retirement Parties and Department Open Houses.*)
- Attach documentation (see pages 2-3) to completed form. Send to Dining Services if ordering food and Accounting Services if requesting reimbursement (include Direct Payment form)

I agree that these food purchases are justified according to UW System guidelines.

Signature Dean/Director/Dept Head

Date

version: 01/24/14

Excerpts From UW System Headquarters City and UW-Sponsored Events Policy Appendix A

A. Refreshment Break Expenses:

1. **When Allowable** - Refreshment break expenses are allowable only in association with a business meeting that meets one of the following criteria:
 - a. facilities are not available within the building or immediate area of the meeting where attendees could obtain and consume normal break items within a typical break period (10 to 20 minutes), or
 - b. having the attendees leave the meeting room would have an adverse effect on the continuity of the meeting, meaning it is expected that break items be consumed while the business meeting or program continues, or
 - c. the majority of attendees are not UW / State employees. For purposes of applying this provision, board members are not considered employees.
2. **Allowable Expenses** - Refreshment break expenses must be limited to one break each morning and afternoon. The break may consist of nonalcoholic beverages such as coffee, tea or soft drinks, and at the discretion of each institution, a small food item may be included. The total cost must be reasonable and should not exceed \$5.00 per person. Events that include a continental breakfast must not include additional food items at the morning break.
3. **Documentation Requirements** - The following documentation must accompany the request for payment:
 - a. The name, purpose, number in attendance, date and time (beginning/ending) of the meeting. A meeting agenda which includes all the required information is preferred.
 - b. A statement indicating which of the criteria outlined in A.1. was/were met. If the refreshment break is allowed on the basis of A.1.c., the number of UW / State employees and nonemployees must be provided.
 - c. Original invoices/receipts showing the amount to be paid or reimbursed.

B. Meal Expenses:

1. **When Allowable** - If the meeting is held at the headquarters location of the majority of the attendees, a provided meal is acceptable only if the business could not be effectively conducted in such a manner so as to avoid the necessity of the meal. It is not appropriate for payment of meal costs at an employee's headquarters location unless a mealtime speaker is scheduled, business is actually conducted during the meal, or facilities are not available near the meeting location for the attendees to eat at their own cost.
2. **Allowable Expenses** - Meal expenses, including tax and tip, for UW/State employees included in the payment are allowable only up to System meal maximums.
3. **Documentation Requirements** - The following documentation must accompany the request for payment to a vendor or reimbursement to the employee:
 - a. The name, purpose, date and time (beginning/ending) of the meeting. A meeting agenda which includes all the required information is preferred.
 - b. A list of meeting participants for whom expenses are to be paid, indicating name and affiliation, i.e., institution, state agency, business, etc.
 - c. Original invoices/receipts itemizing the cost per meal and showing the total amount to be paid or reimbursed.
 - d. Justification for holding the meeting over the meal period.

C. Reception Expenses:

1. **Definition** - A gathering of individuals associated with a UW-sponsored event that provides the opportunity for interaction in a setting that is not purely social in nature. Unlike a business meeting, a reception may not have a specific agenda or time frame. Like a business meeting, the purpose must be related to or promote the mission of the hosting department. Expenses are not allowable for receptions that are solely for social or entertainment purposes, except as provided in other UW System policies. Examples at the end of this section describe receptions for which expenses paid by UW-administered funds would be allowable.

2. **Allowable Expenses** - Reasonable food and beverage costs, reception room cost, service charges and gratuity may be paid. Even though it may not be possible to determine in advance how many will actually attend, a reasonable effort should be made to minimize expenses resulting from overestimated attendance. The hosting department should be prepared to justify the cost of the event to the news media and to political and private interests. Refreshments cannot include alcoholic beverages.
3. **Documentation Requirements** - The following documentation must accompany the request for payment:
 - a. A statement or document which substantiates the official business relatedness of the reception.
 - b. original invoices/receipts showing the amount to be paid or reimbursed.
 - c. When it is anticipated that the reception will be attended primarily by UW/State employees it will be held on campus.
4. **Examples of Allowable Receptions:**
 - a. A college of a UW System institution hosts a reception in conjunction with a guest speaker at an arts and lecture series to provide the participants an opportunity to discuss the topic of the speaker.
 - b. The art gallery hosts a reception for the opening of an art exhibit to provide the participants an opportunity to discuss the exhibit with the artists and other participants.
 - c. Critic teachers are requested to attend a business meeting from 4-6:00 p.m., followed by a reception, but not dinner, and informal discussions relating to the instruction of student teachers