



Accounts Payable
Food & Catering
Business Meals and Sodexo

Cabinet Level Approval

Purchase Payment Request Form

Until further notice **all purchases and/or payments**, (any intents to purchase, new or recurring payments, direct pays, travel reimbursement and non-travel reimbursements and business meals) *regardless of fund source (state, local, foundation, agency 8xxx)*, require Cabinet level approval prior to completion. Review by the Cabinet member is facilitated through submitting the [Purchase/Payment Request Form](#). Once approved or denied, you will be notified with next steps on how to make the purchase or payment, including reactivation of your charge card if needed.

Business Meal and Food Approval Form

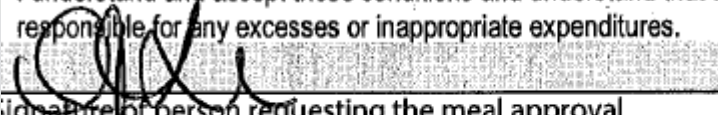
- The Commonwealth establishes maximum spending amounts for business meals. These meal amounts are found on the Business Meal and Food Approval Form, which is required to be completed and **approved PRIOR to:**
 - **The meal/food purchase**
 - **The order being placed** (for example, orders placed at Sodexo)

EXAMPLE—Sodexo

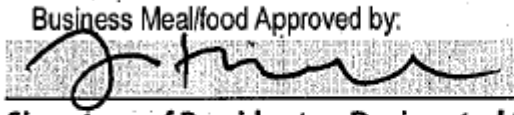
The Order # in Sodexo's system is actually a QUOTE. The examples below show what is needed for Compliance.

Business Meal Form Approval Date by Designated Signer = 10/29/19

I understand and accept these conditions and understand that the payer is responsible for any excesses or inappropriate expenditures.

Signature of person requesting the meal approval:  Date: 10/29/19


Date or Date Range for meal(s)/food: 11/5/2019

Business Meal/food Approved by:  Date: 10/29/19

Signature of President or Designated Signer **Date**
Do not approve for yourself. President's designees can be found at:
<http://adminfinance.umw.edu/ap/designees/>.
If your name is not on this list, do NOT sign here!


No Compliance Issues

Ordered On date = 10/29/19

ORDER #13068
Tuesday, 11/5/2019
Ordered On: 10/29/2019
Last Modified: 10/29/2019 4:21:27 PM
 **Confirmed**

Compliance Issue

- Ordered On date of 10/20/19 is BEFORE the approval date
- User needs to document as shown

ORDER #13068 UMW Food Service Contractor
Tuesday, 11/5/2019
Ordered On: 10/20/2019 → This is the QUOTE date. I
Last Modified: 10/20/2019 4:21:27 PM got the quote on 10/20/19 +
then prepared the Business
Meal Form. Actual ORDER
date was 10/30/19.
 **Confirmed**
UMW
11/5/19

Food and Catering

- Complete the [Business Meal and Food Approval Form](#) to determine the method of payment to be used for food purchases, including Sodexo.
- If it is determined that a UMW Finance Card is needed for payment, follow the steps on the AP website on [Securing a UMW Finance Card for Business Meal/Food Payment](#)
- Contact Procurement Services for all Procurement Regulations that may apply to any catering purchase.
- Special Offers or Discounts – Be sure to identify your connection to UMW and ask for any special offers or discounts.

Business Meal Requirements

- The reason for the meal/food purchase involves a substantive and bona fide business discussing official state business that is documented on the Business Meal and Approval Form.
- The meal should include a non-UMW employee. Meals for family members, significant others, etc. are NOT allowable.
- The President or designated signer approves a completed Business Meal and Food Approval Form. **NOTE** the approval date should demonstrate the approval was done in advance. **For ORDERED items, such as with catering, the approval date MUST be PRIOR to the ORDER date.**
- A list of ALL persons by name involved MUST be included on this form. If the meal or function is open to the campus or a specific group, identify the group name and include an approximate number.
- An ORIGINAL, ITEMIZED receipt showing all items purchased for the meal is provided. (Credit card slips with only a total are NOT acceptable.)

Exception – When a Business Meal and Food Approval Form is NOT Needed

- Food on overnight Travel



- When food is NOT for human consumption (Reason for the food purchase MUST be documented)



- Stage Props (Reason for the food purchase MUST be documented)



Business Meal Restrictions



- **Waivers** – If food is purchased from an **offsite vendor** for a meal/event that is held ON a UMW property (including James Monroe Museum, Belmont, etc.), **a waiver may be required** in order to comply with the current UMW Food Services Contract. Completing the Business Meal and Food Approval Form will help determine requirements and provide a link to the waiver request as needed. Click [Waiver Request](#) for a direct link to the waiver request form. Also, please contact [Procurement Services Department](#) for additional requirements.
- **Tips & Delivery Costs**
No more than 20%, including taxes and delivery



Conclusion

This site provides details about Business Meals and has the link to the Business Meal and Food Approval Form.

<https://adminfinance.umw.edu/ap/business-meals/>



[Business Meal and Food Approval Form](#)

Required to be completed and **approved prior** to the meal/food purchase. **OPEN FORM IN FIREFOX or INTERNET EXPLORER.**