



# Business Expense Form (BEF) Process Improvement

➡ Champion Team: Alyssa Favila-Herrera, Juan Ortiz, Jim Cox, and John Strubelt



# Business Expense Form (BEF)

- ➡ Acknowledgement of Feedback
- ➡ Commitment to Improvement
- ➡ Key Improvements
- ➡ Employee Involvement
- ➡ Timeline and Updates
- ➡ Support and Training

<b>Business Expense Form (BEF)</b>		Prepared By: _____ Phone/Ext: _____ Today's Date: Mar 18, 2025									
<b>Instructions:</b> Complete form for all expenses incurred for entertainment, hospitality, and employee awards, gifts and prizes regardless of whether a reimbursement will be processed (e.g. ProCard/IDT expenses). One BEF is required for each event/business purpose, whether there is one payee with multiple receipts or multiple payees. One BEF may also be submitted for reimbursement of an individual for multiple events or business purposes (up to 3). Attach BEF to Expense Report or Non-PO Voucher in PeopleSoft. For employee gifts, attach BEF and supporting documents to eForm (cash) or send to Payroll (non-cash). Departments not seeking reimbursement (for example, ProCard or IDT) must retain this form and supporting documents on file (subject to audit review).											
<b>PAYEE:</b> Enter the payee name, EMPLID and payment amount. Select 'Add' to enter additional payees, up to five.											
1) Payee Name: _____ EMPLID: _____ Amount: _____ <input type="checkbox"/> Add											
<b>EVENT/GIFTS:</b> Enter up to three events and/or gifts. If your event occurs on multiple days AND contains different attendees, you must treat each day as a separate event. Click 'Add' to add another event/gift to this request.											
<b>1. Event Name:</b> _____ Begin Date: _____ End Date: _____ Time: _____ Explain Business Purpose (below): _____ Total # of Attendees: _____ <div style="height: 40px; border: 1px solid #ccc;"></div>											
<input type="checkbox"/> Traveling? <input type="checkbox"/> Alcohol Included? <input type="checkbox"/> Off Campus? <input type="checkbox"/> Employee Award/Gift/Prize?    See <a href="#">Employee Awards, Gifts, &amp; Prizes</a> <span style="background-color: #ffcc00; padding: 2px 5px; font-weight: bold;">Add Event #2</span>											
<b>Gift</b> EmpName: _____ EmpID: _____ Purpose: _____ Desc: _____ <input type="checkbox"/> Notified Payroll? <input type="checkbox"/> 3rd Party Fund?											
<b>FUNDING:</b> Select the funding source from the drop-down menu and enter the account number and account title to be charged, up to five.											
1. Funding Source: _____ Account: _____ Cost Center: _____ Enter the related event # (above): _____ <input type="checkbox"/> Additional funding source											
<b>EXPENDITURES:</b> Select the expense type from the drop-down menu and enter the amount in the appropriate field. If the expense did not include meals and/or beverages, enter the expense amount in the Other field. Click Add to enter additional expenses related to your event, up to five.											
<b>1. Event Name:</b> _____ <b>Begin Date:</b> _____ <b>Total # of Attendees:</b> _____											
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">Expense Type</th> <th style="width: 20%;">Breakfast / Lunch / Light Refreshments</th> <th style="width: 20%;">Dinner</th> <th style="width: 20%;">Other Amount or Gift Amount/FMV</th> </tr> </thead> <tbody> <tr> <td>a) Select one _____</td> <td>_____</td> <td>_____</td> <td>_____ <input type="checkbox"/> Add</td> </tr> </tbody> </table>				Expense Type	Breakfast / Lunch / Light Refreshments	Dinner	Other Amount or Gift Amount/FMV	a) Select one _____	_____	_____	_____ <input type="checkbox"/> Add
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a) Select one _____	_____	_____	_____ <input type="checkbox"/> Add								
<b>Meals Cost Per Person</b> (computed below) cannot exceed maximum allowable per person limits unless authorized by a VP. Current per person limits including gratuity & sales tax: Breakfast \$35 / Lunch \$35 / Light Refreshments \$35 / Dinner \$70		<b>SUBTOTAL (excluding alcohol):</b> _____ Enter Alcoholic Beverages Only: _____ <b>EVENT TOTAL:</b> _____									
Breakfast / Lunch / Light Refreshments: _____ Other: _____ Dinner: _____ Alcohol: _____											
<b>VOUCHER ID:</b> Enter up to 5 PO or Voucher ID #'s. _____ <input type="checkbox"/> Add		<b>ATTENDEES:</b> Enter up to 10 names and the related event number (from above). If your request includes multiple events and the total number of attendees is more than 10, you must either use additional sheets or refer to attendees by a representative description for the group. For flowers, indicate recipient's name and affiliation with UTSA.									
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Official Guests/Participants Names</th> <th style="width: 20%;">Business Affiliation</th> <th style="width: 20%;">Event #</th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td>_____</td> <td>_____ <input type="checkbox"/> Add</td> </tr> </tbody> </table>		Official Guests/Participants Names	Business Affiliation	Event #	1. _____	_____	_____ <input type="checkbox"/> Add		
Official Guests/Participants Names	Business Affiliation	Event #									
1. _____	_____	_____ <input type="checkbox"/> Add									
<b>EVENT HOST CERTIFYING PAYMENT</b>		<b>ADMINISTRATOR APPROVAL</b>									
<i>I certify that the expense(s) included in this request was incurred for the benefit of the university or respective funding agency, in connection with official university duties and not for personal use, in accordance with university guidelines. I certify that if there are other payments or reimbursements for this event, the total cost using university funds is not more than the allowable rates.</i>		A designated, authorized approver of entertainment & hospitality expenses who is at least an Asst/Assoc Dean, Dean, Asst/Assoc VP, VP or Pres. Employee Gifts < \$100 only require Asst/Assoc Dean/VP									
Name: _____ Title: _____ Signature: _____ Date: _____		Name: _____ Title: _____ Signature: _____ Date: _____									
<b>ADDITIONAL APPROVAL</b>											
Reason: <span style="border: 1px solid #ccc; padding: 2px;">Select one</span> Name: _____ Title: _____ Signature: _____ Date: _____ RSC Approved By (print name): _____ Signature: _____ Date: _____											
<b>For Office Use Only</b>											
Reviewed By: _____ Date Processed: _____											

# Business Entertainment & Hospitality Request (BEHR)

- ➔ Introduction to the New Form
- ➔ Refreshed form purpose and approval process
- ➔ User-Friendly Design
- ➔ Enhanced Security
- ➔ Efficiency and Waste Reduction
- ➔ Minimize Confusion

# Pilot Group

- ➔ Introduction to the Pilot Group
- ➔ Cross-campus representation
- ➔ Comprehensive Feedback
- ➔ Organizational Depth and Breadth
- ➔ Commitment to campus feedback

# BEHR Form Demo

# Pilot Group

Name	Title	Department
Amy Fritz	Admin Operations Officer	Financial Affairs
Chelsea Vietri	Business Administrator	Academic Affairs Provost
Eddie Alvarez	Business Service Center Manager	College of Business
Emily Witter	Admin Associate II	Financial Affairs
Erecelia Neaves	DTS Specialist III	Disbursements Travel Services
Iris Montoya	BSC Specialist III	Business Affairs
James Gellido	BSC Specialist II	Student Success
Justin Marmolejo	Asst Director	Research Sponsored Projects
Kirsten Wilsey	Asst Dean Fiscal Administration	Klesse College Engineering
Lara Goldman	BSC Specialist I	Athletics
Mike Findeisen	Asst Dean	College of Science
Patty Cerda-Arguijo	Director Fiscal Admin	Student Union
Teresa Vela	DTS Specialist III	Disbursements Travel Services

# Form Improvement Process

- ➔ Feedback
- ➔ Review and Adjustments
- ➔ Final Feedback

# Next Steps After the Pilot

- ➔ Analyse Feedback
- ➔ Implement Changes
- ➔ Final Review
- ➔ Training
- ➔ Roll out new form
- ➔ Ongoing Support





Questions?



# UTSA<sup>®</sup>

## Business Affairs

