

## Process for Approving Travel and Travel Reimbursement

To request travel on a grant the PI needs to submit a prior approval travel checklist form to Mr. Raymond Mock (Post-Award). On the form please fill out the name of the person traveling, department, name of conference/meeting, destination, dates of travel, purpose of travel, the grant/fund to be used, and estimates of any costs or expenses including registrations, transportation, rental vehicle lodging, meals. This needs to be done for all travelers for each trip. This needs to be submitted no later than 30 days before travel. Post-Award will then submit a prior approval into Chrome River for the travel to be approved beforehand.

Once approved the traveler(s) can start working with the PI to make expenses and reservations related to the trip. Before the dates of travel purchases that need to be made include registration, transportation (flight/train), and lodging, and rental vehicle. For these purchases these need to be done on a Procard as direct reimbursements are usually not allowed on these expenses (e.g. Expense >\$100, taxes). The PI will submit the necessary information to Mr. Raymond Mock who will work to reserve and pay these expenses beforehand.

- Registration: URL Link to registration, price for registration, deadlines for registration (ex. Early bird date), membership number (if applicable)
- Lodging: Name of hotel, URL Link to reservation, address where located, # nights staying, dates of lodging, contact information for hotel (email, phone number), discount codes (if applicable)

\*If doing a 3<sup>rd</sup> party lodging accommodation, a pre-approval form for that will need to be filled out by Post-Award and submitted for approval beforehand. Please provide a quote along with a justification of why 3<sup>rd</sup> party lodging would be more cost effective and the necessity for 3<sup>rd</sup> party lodging\*

- Transportation: Name of airline/train, dates & times of travel, location of airports or train stations, URL Link to ticket reservation, discount codes (if applicable)
- Vehicle Rental (Enterprise): Dates for pick up/drop off, location for pick up/drop off, type of vehicle

\*Travel will only cover coach fare for transportation. Choice seats will not be paid for unless there is a need based on a documented disability. Approval from Disability Support Services (DSS) is required and on file with Human Resources before payment for choice can be processed\*

Registration, Lodging, and Airline/Train Transportation need to be paid for with a Procard before the trip. The traveler should avoid using their own form of payment and be reimbursed for these expense on travel unless it is an unexpected emergency (e.g. delay/lag in travel, emergency stop) or a last minute change in reservation where they don't have access to a Procard. If a prior approval and/or any reservations/purchases have to be canceled for any reason, please contact Post-Award as soon as possible.

Once the trip has completed the PI will submit to Mr. Raymond Mock (Post-Award) a travel expense reimbursement form along with any documentation related to registration, transportation, lodging, and vehicle rental paid with a Procard and all receipts and any documentation necessary for reimbursement that took place during travel. Reimbursement are expenses paid out of the traveler's pocket during the trip that can be covered. This includes mileage (if traveling using personal vehicle), tolls, parking, meals not covered by the conference/workshop, and miscellaneous fees (ex. Extra baggage fee).

- Mileage: Travel log with dates, addresses from start to end, estimate of miles traveled, justification for expense
- Tolls: Receipt with date and amount, justification for expense
- Parking: Receipt with date and amount, justification for expense
- Meals: Done at per diem rate. Need dates and times for when trip started and trip ended. Also need agenda of conference/workshop if meals were provided by host of conference/workshop. Need receipt

with date and amount for meals not covered. If hosting an event and buying food items/catering for participants, a list of attendees is needed.

\*100% reimbursement for meals is not guaranteed. Meals are not covered for day trips.\*

\*With the exception of mileage and meals, any receipts paid for with the traveler's own personal credit should include a bank statement showing the expense and the last 4 digits of their credit card.\*

Post-Award will then submit a travel expense report into Chrome River to be approved for all expenses paid with a Procard through Post-Award and reimburse the traveler for all expenses not paid with a Procard. This needs to be submitted no later than 30 days after travel has been completed. Any expenses not used will go back on the grant/fund to be used for other purposes.

### **Process for Approving Blanket Travel and Blanket Travel Reimbursement**

Blanket travel is for trips that are repetitive and do not involve an overnight stay. Blanket travels should be set up at the beginning of the fiscal year or as soon as it is known the traveler needs to have blanket travel set up. To request blanket travel on a grant the PI needs to provide to Mr. Raymond Mock (Post-Award) the names of the individuals to be covered for travel on the grant, the grant/fund to be used, and amount of money to encumber/set aside on the grant for the traveler. This needs to be done for all travelers before they can start traveling. This needs to be submitted no later than 14 days before travel. Post-Award will then submit a prior approval into Chrome River for the travel to be approved beforehand. Only mileage, gas, parking, and tolls are allowable expenses on blanket travel.

Once approved the traveler can start traveling and will need to keep a log of all dates and destinations traveled and receipts (gas, parking, tolls) and submit to the PI at the end of each month for approval. Once approved, the PI will submit to Mr. Raymond Mock (Post-Award) the following:

- Mileage: Travel log with dates, addresses from start to end, estimate of miles traveled, justification for expense
- Gas: Receipt with date and amount, justification for expense
- Tolls: Receipt with date and amount, justification for expense
- Parking: Receipt with date and amount, justification for expense

Post-Award will then submit a travel expense report into Chrome River to reimburse the traveler for all expenses submitted. This needs submitted no later than 30 days after travel has been completed.

\*June blanket travel is due earlier than the end of the month because of closing out prior fiscal year blanket requests. Additional funds to be encumbered can be added necessary. Any funds not used when blanket travel ends will go back on the grant/fund to be used for other purposes.\*