

Responsibilities of Traveler

Travelers are responsible for ensuring they have the necessary administrative approvals for a trip prior to committing university funds. This includes ensuring that approvals have been obtained to use the center numbers(s) included on the expense report. Additionally, travelers are responsible for coordinating with the appropriate department or school to ensure that funds are available to pay for the travel.

Except for extreme cases necessitated by business need, use the university travel tool for all university business travel. If lower rates for accommodations are available by other means (e.g., conference room block rates/professional society, etc.) these may be booked by the traveler.

The university's travel tool should not be used to make personal travel arrangements.

Exercise same care in incurring expenses and accomplishing the purposes of the travel that a prudent person would exercise if traveling on personal business.

Obtain all proper documentation for each expense. (Typically, this documentation will be a receipt that identifies the expense and reflects proof of payment of the expense).

Document the business purpose or justification for each expense. This helps to document why the expense is eligible for reimbursement and should not be considered as taxable income. If a group meal is included for full reimbursement, a list of attendees and purpose must be provided.

Identify and segregate any entertainment charges including alcohol. Alcoholic beverage costs are generally considered personal expense unless necessary to support the business purpose of the travel. All meals without itemized receipts must have a certification statement that no alcohol was included.

Identify unallowable personal expenses such as in-room movie(s), health club packages, or any other personal expenses considered entertainment.

Insure that all expenses are appropriate, valid, policy compliant and within budget

Responsibilities of Approver:

Understand of the nature of each expenditure and the business purpose for University reimbursements

Review completeness of documentation and accuracy of accounting

Verify allocation and segregation of expenses to the appropriate University account(s) and/center(s).

Insure that all expenses are appropriate, valid, policy compliant and within budget