

Travel Approval and Reporting Procedures for Faculty and Chairs/Directors

This policy conforms with the CSU Travel Policy

<http://www.csuohio.edu/compliance/travel-policy>

1. **Eligibility for university funds.** Consult current statement of University Travel Policy, accessed from Controller's Office home page, in order to determine if
 - a) Purpose of proposed trip meets guidelines for official university business, and
 - b) What expenses will be reimbursable, at what levels, and with what needed receipts?

Here is the current link (open selecting from the right-click menu):

<http://www.csuohio.edu/offices/controllers/>

2. **Advance Approval Requirement.**
 - All university-funded international travel requires advance approval of the **dean's and provost's offices.**
 - All university-funded national travel requires advance approval of the **dean's office.**
 - In-state travel requires only the advance approval of your department/ School 's chair/Director.
 - Faculty who travel on university business without funding also must complete the advance approval process for purposes of insurance coverage and missed class policy.
3. **Requesting Advance Approval.** Faculty members need to submit two forms to receive travel approval. Both the *Travel Approval and Expense Report* and a *Travel Supplementary Information Form* (available from the CLASS Manual under Travel) should be submitted at **least 30 days for international and two weeks for domestic travel** before planned departure. In all cases, faculty travel must be approved prior to the travel dates.

In order to secure initial travel approval, faculty members are required to complete the top portion of *Travel Approval and Expense Report*, including the the purpose of the trip, estimated expenses, and the portion to be paid by CSU. Additional explanation of these items should be provided on the *Travel Supplementary Information Form* that will be attached, along with any requested documentation, such as conference registration and presentation invitation, paper acceptance or program listing.

4. **Missed class plan.** On the *Travel Supplementary Information Form*, the faculty member also indicates if any classes will be missed, and if yes, what alternative in-class learning experience will be provided in the absence of the faculty member. The designated learning experience (e.g., a guest lecture) should be consistent with the learning objectives of the course; independent study or library assignments normally will not be approved unless explicitly listed in the initial course syllabus. Article 11.3.B.2 of the CSU-AAUP Agreement addresses the responsibilities of faculty who must travel during scheduled classes.

5. **Chair/Director advance approval.** When signing the first approval line on the Travel Approval and Expense Report, the Chair/Director is signifying that she/he has reviewed the request and has judged:
 - a) It meets university standards for official business;
 - b) The budgeted expenses are allowable and reasonable;
 - c) The plan for any missed classes is acceptable; and
 - d) The department has funds to cover the funding level requested.

CHAIRS/DIRECTORS --In some cases, this last point may mean checking the sufficiency of funds in the faculty's start-up account for new faculty, grant lines, or other designated source of funds. Be sure to check if the proposed use of funds is consistent with the previously approved proposal and/or if the particular funds may be used for the purpose stated for the proposed trip.

6. **Dean's and Provost's office advance approval.** The associate dean reviews the information forwarded from the department/school, signs the second approval line, and forwards to the Provost's office for their further review and approval. The faculty member will know the travel has been approved when the signed form returns to the department—allow one week before making any inquiries to the dean's office.
7. **Prepayment option.** Once the travel form has been signed, if it includes a requested prepayment of eligible expenses (usually only airfare and registration, see University Policy statement), the department submits a copy of the pre-approved travel form and the prepayment request along with the receipts to a Magnus Mart.
8. **Expense report preparation and receipts.** *Within two weeks* of completing the approved travel, faculty member completes and signs the expense section of the Travel Approval and Expense Report, attaching any required receipts and proof of travel and attendance, as specified by University Policy.
9. **Expense report approval and reimbursement.** Chair/directors, then associate dean, and finally, the Provost's office representative each review and sign off on all correctly completed expense reports. Provost's office will return the approved travel form to the department/school submits the refund request along with the receipts to a Magnus Mart. If any corrections are necessary, the travel forms will be returned to the departmental /school office.
10. **Student Travel.** University-supported or sponsored travel by *students* requires completion the Travel Approval and Expense Report form and the student waiver form. The "**Release and Waiver of Liability Form**" can be downloaded from the CLASS Manual.