



<b>Procedure:</b>	Travel Requests
<b>Functional Area:</b>	ADMINISTRATIVE
<b>Policy Reference:</b>	Employee Handbook, Section 7.12, pp 72-73

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<b>Status:</b>	<b>FINAL</b>
<b>Effective:</b>	11/15/2022
<b>Procedural Contact:</b>	Senior Director of Professional Development
<b>Responsible Office:</b>	SOM Office of the Dean
<b>Last Reviewed/Updated:</b>	11/10/2023
<b>Applies to:</b>	Faculty and Staff

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**Purpose:** The purpose of this procedure is to outline the steps required for SOM faculty/staff traveling on University business or for professional development.

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**Policy Statement:** UIW will pay reasonable travel expenses incurred by employees who travel on UIW business. Traveling employees must make every effort to minimize travel costs. The following rules govern travel expenses:

- The traveler's direct supervisor must authorize the travel for faculty/staff in advance;
- The Dean must authorize travel for Administrators in advance;
- The Provost must authorize travel for Deans in advance;
- Travel must be in the best interest of UIW. Examples include but are not limited to:
  - Training purposes
  - Attending meetings/conferences
  - Travel as a result of being elected as an officer in a professional organization
  - Travel to other educational institutions or agencies to review projects or programs
- Original receipts and documentation are required for out-of-pocket expenses including charges on UIW credit cards.
- Transportation and/or other travel arrangements must be coordinated through UIW's travel agency.

**I. Procedure** –For Professional Development travel (i.e. Conferences, CME events, meetings)

**A. TRAVELER Responsibility**

1. Traveler should complete the following **pre-approval documents** and submit to their assigned Admin (see list in OneDrive Travel folder) as soon as possible:
  - a) UIW General Travel Expense Form – TOP PORTION AND FIRST COLUMN (see Shared Drive travel folder): must include documentation of flight preference/estimated expense, hotel preference/expense, conference program (for anticipated meal expense) and registration expense –required for confirmation of available funds from budget
  - b) Rental car request form (only if vehicle is needed)

- c) Internal Leave Request Form – required for coverage of responsibilities
- 2. Traveler must submit all forms (with requested documentation) to admin for budget review and approval by supervisor/dean **before** arrangements are made.
- 3. (**AFTER TRAVEL**): Travel Expense form must be completed (column 2 and signature) and submitted to your Admin for final approval immediately upon return from travel.

**B. ADMIN Responsibility**

- 1. If approved, support personnel will provide traveler and Accounts Payable with a copy of the signed expense form, per the UIW travel policy
- 2. Support personnel will work with travel agent and Vehicle Services (if rental car is needed) to make requested reservations
- 3. Support personnel will email airfare quote to traveler for approval – approval response must be sent back immediately – written confirmation is required by travel agent to book
- 4. Support personnel will book hotel and send necessary authorization forms if traveler doesn't have a University-issued credit card for payment;
- 5. Support personnel will send all details to traveler once arrangements are finalized (flight, hotel, car)
- 6. Support personnel will send final signed expense form (**after travel**) to Accounts payable and provide traveler with a copy

**C. Travel Agent/Vehicle Services Responsibility**

- 1. A rep with Corporate Travel Partners will book flight and send final confirmation to support personnel
- 2. UIW Fleet Coordinator will book rental car and send confirmation to support personnel