DEPARTMENT OF MATHEMATICS
TRAVEL APPROVAL PROCEDURES

INTRODUCTION:

Units within CAS are responsible for ensuring that employee travel has been properly approved and that applicable travel policies, rules, regulations, procedures and guidelines have been applied. The College of Arts and Sciences has been delegated the task of assigning a hierarchy of responsibility for approvals for employee travel payments from all university funds. To that end departments and programs have been asked to develop written employee travel approval policies and procedures readily available to all travel staff and travelers for reference. A copy of these procedures must also be filed in the CAS Dean’s Office each year.

APPROVAL POLICY:

- All travel, regardless of source of funds, must be reviewed and approved by the department head. In the rare instance that the department head is not available, in a timely fashion, the Chairman of the Travel Committee is authorized to give approval.
- Travel approval should be obtained in advance of the trip if at all possible. (Please note that without advance approval neither the university nor the department have an obligation to reimburse payments for travel expenses.)
- Requests for travel approval must be in writing and must include a business purpose, the level of expenditures, and the source(s) of fund(s).
- The business purpose must include at a minimum
  - Start and end dates, or multiple dates when personal and professional travel are combined
  - Location(s)
  - Activity
    - The name(s) of the organization(s) involved (no acronyms, please); the names and positions of individuals visited/consulted; or institutions visited; or other descriptions as appropriate.
    - A description of the university related activity itself. The description of the activity should be specific and mention, for example, research topic, paper title, and the like, as appropriate.
- Travel approval must be documented in writing. The documentation must be available for audits.

SPECIFIC APPROVAL PROCEDURES:

When planning a professional trip, travelers need to fill out a departmental travel authorization form and submit to the departmental travel staff. It is in everyone’s interest to do so well in advance of the travel start date. Please remember that neither the university nor the department have an obligation to reimburse for travel expenditures if advance approval has not been obtained.
After review for completeness, availability of funds, and compliance, the department's budget manager will submit the travel authorization form to the department head for approval. Once approval has been obtained, the traveler will be notified by travel staff. Every effort will be made to process travel authorization forms as quickly as possible. After the Department Head has approved the travel, other paperwork relating to the travel (travel reimbursements, airfare authorizations, etc.) and within the terms of the signed approval form, may be approved by the Budget Manager.

Reimbursement or payment requests that differ substantially from the original travel authorization will follow the same procedures. The budget manager will review the request for completeness and compliance and then obtain approval from the department head. If reimbursement requests follow the original travel authorization, no further approval is necessary.

Please note two special situations:

1. Faculty who plan to travel during the academic year when classes are in session, even though they themselves may not be teaching during the term of the planned trip, must follow the policy of the CAS Statement of Faculty Responsibility. This policy requires faculty to make their absence from campus known depending on length of time away.

   https://casweb.uoregon.edu/anon/documents/policies/travel/TravelApprovalGuidelines.htm

2. Faculty requesting funds for travel during a sabbatical leave year must obtain additional approval in advance from the CAS Deans' Office and the Vice President of Academic Affairs using the “Sabbatical or Leave without Pay Travel Approval Request Form”.

AUDIT TRAIL:

Because employee travel and appropriate approval is an auditable activity, the departmental budget manager will maintain records documenting that appropriate travel approval was obtained. This documentation consists of the travel approval forms signed by the department head or his/her delegate and reimbursement requests, airfare authorization forms, etc. signed by the budget manager or department head or his/her delegate.

ACCESS TO TRAVEL APPROVAL FORM:

Faculty may access the Math Department travel approval form on our website at http://math.uoregon.edu/resources/travel.pdf. Instructions for filling out the form and sending to travel staff are also posted there.

Approved by Hal Sadofsky, Department Head

Date

1/16/13

Last Updated 12/20/2012