

Student Travel SOP

1. If you are planning to travel, you must submit a travel authorization form to Zoe Anderson at least **72 hours before you plan to travel**. If you wait until the day before you leave, we cannot guarantee it will be processed. A summary of expenses will be sent to your PI for approval. You will enter your Travel Authorization using this link: [Travel Authorization Form – Fill out form](#)
2. While you are travelling, please keep in mind that you will need **ITEMIZED** receipts for all expenses.
3. Once you return, submit a travel voucher form using this link: [Travel Voucher Form – Fill out form](#)
4. This form allows you to upload of all **ITEMIZED** receipts as well as **PROOF OF PAYMENT** of those charges. Proof of payment means a copy of your credit card statement showing the full amounts that were paid. A PDF redacted bank statement is also allowed. If you have access to your credit card account online, screenshot or "print to pdf" those statements. If you do not have online access, upload a scan of your physical statement, redacting other purchases as necessary.
5. If the name on the invoice is different from the name on the credit card, a memo will be needed explaining why (example – parents helping to pay for travel).
6. You will not upload meal receipts. You will be reimbursed for meals by [the Controller's Office meal per diem guidelines](#). Your reimbursement will be calculated dependent upon your departure and arrival times and the number of days travelled.
7. You will not upload gas receipts. Your gas purchases will be reimbursed based on the miles driven multiplied by a factor of \$0.76. Indicate the miles driven by showing your route on a mileage map between your starting point and destination.
8. If you purchased your registration and membership at the same time, only your registration will be reimbursed. You must upload a travel split cost memo; the template is on the department resources page.
9. Please keep in mind that if you share a hotel room, the person who paid for the room will be the person who gets reimbursed. **Do not split costs until reimbursement has**

been finalized. If you did split the cost with someone, please make sure to notate that on your travel voucher form.

10. If you receive a travel award, upload a copy of the email or letter informing you of the award and the amount.

11. Reimbursement requests submitted more than a month after travel will require a memo justifying why it is late.

Faculty:

We are updating the travel authorization and voucher process.

Travel authorization workflow:

- Your student fills out a TA Microsoft Form with anticipated travel dates and expenses.
- A summary of the TA form submission is automatically emailed to you, the PI, immediately followed by a second email containing Approve or Reject buttons with the option to add comments if necessary.
- Approve: an email is sent to Zoe Anderson informing her of your approval.
- Reject: an email is sent to your student informing them of your rejection along with any comments. Zoe is also aware of this rejection through an update to her worksheet.
- Once approved, the TA is submitted through PeopleSoft.

Travel voucher workflow:

- Your student fills out a TV Microsoft Form with travel dates, purchase receipts, and bank statements.
- The submission is sent to an Excel worksheet containing calculations for meal per diem and a OneDrive folder containing all uploaded receipts and statements
- Zoe Anderson is notified of the TV submission and submits it through PeopleSoft.