

Travel Procedure—Updated 9.17.20

Before Traveling:

1. *Faculty member submits Agile Fleet request to chair with supporting documents, without having completed PO for hotel and/or registration. **Conference reimbursement policy and preferred hotel must be included with request.***
2. *Chair forwards approved Agile Fleet paperwork and support documents to Dean of Faculty's office.*
3. *Dean of faculty sends an email to traveler and chair in response to Agile Fleet request. Email will include amount approved, funding source, dates of travel, name of event, and request that traveler contact travel office in 3-5 workdays to complete process. (See note on Self-Pay Option below).*
4. *Dean forwards Agile Fleet paperwork to vice president for administration for subsequent approvals.*
5. *Vice president for administration approves and assigns cost code to Agile Fleet request, then forwards to travel office.*
6. *Traveler contacts travel office 3-5 business days after receipt of email to schedule an appointment for conference and hotel transaction.*
7. *Travel office makes flight reservation based on Agile Fleet form, working with traveler to finalize schedule and details.*
8. *Travel office and traveler complete conference registration and hotel reservation during appointment (see #6). The university's Bank of America credit card will be used to purchase both, eliminating the need for chair to request that sponsoring organization for conference be added as a vendor. The chair does **not** need to generate a PO for travel-related payments made by Vanessa using the Bank of America card.*
9. ***Traveler requests copy of hotel payment confirmation (not just reservation) from Vanessa in travel office.** This should be retained and taken to hotel in case of issues upon arrival (i.e., desk clerk has no record of reservation and/or payment).*

Upon return:

10. *Traveler submits Application for Travel Reimbursement as quickly as is practical upon return with receipts for conference (signed), hotel (signed), and expenses incurred. (Though they are not "reimbursable" if they were paid in advance, the conference and hotel receipts will allow Vanessa to reconcile her statements.)*

SELF-PAY OPTION: After steps 1 and 2 above are completed and traveler receives dean's email, traveler may pay hotel and registration costs out of pocket and seek reimbursement for all upon return.

CRITICAL NOTES:

- Traveler **must** book flight through travel office to ensure that it will be paid by university.
- If registration and hotel payment are paid by the university but not handled through Vanessa's office (i.e., traveler requires check made payable directly to organization), chair

will be required to generate a PO associated with the travel. Please seek guidance from Dr. Bell or Sadie Bier in such exceptional cases.