

## How to be Reimbursed for Travel – University Business (conferences, seminars, etc.)

You have been asked to travel on university business or have selected a conference that you wish to attend for professional development. Below you will find a guide for everything you need to do to be reimbursed for your trip.

1. Obtaining approval (At least 21-14 days before the trip)
  - a. Fill out the Travel Approval Form found on the resources tab of the SAAS Ticketing website
  - b. Get the required signatures (usually your director or AVP)
  
2. Creating a ticket (At least 21-14 days before the trip)
  - a. Navigate to the SAAS Ticketing website and choose “Finance” from the options at the top
  - b. Choose “Travel” as your category
  - c. Fill out all necessary information. Take special note of Start Date/End Date. Include the exact times you plan to depart and return from this trip.
  - d. Add an expense line for each item you are claiming reimbursement for. This should mirror the Travel Approval Form you filled out.
  - e. Attach your signed Travel Approval Form and hit Submit
  
3. Travel Authorization (At least 21-14 days before the trip)
  - a. A procurement team member will claim your ticket
  - b. Using the details you provided in the ticket they will create a Travel Authorization in the PeopleSoft system.
  - c. You will receive an automated email from PeopleSoft asking you to approve the Travel Authorization. You must do this before it can move on in the approval process and be fully approved. Not having a fully approved Travel Authorization at the time of travel will delay your reimbursement.
  
4. Go and enjoy the conference!



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### 5. Requesting Reimbursement (Within 14 days of returning from the trip)

- a. On the same ticket you created for the Travel Approval, fill out the Final Travel Reimbursement. Be specific about the departure and return times, as this determines your per diem.



- b. Attach receipts for all expenses you were out of pocket for EXCEPT per diem and personal vehicle use. Per diem is based on the days traveled, destination of travel and times departing/returning. There is no by-receipt reimbursement for meals during travel. Personal vehicle use is based on mileage and a screenshot showing distance traveled should be attached.
  - i. All receipts should be itemized (show what is being paid for)
  - ii. All receipts should reflect a “paid” status
  - iii. All receipts should show method of payment, to include card type and last four digits of the card used
  - iv. If a receipt does not reflect a paid status or show method of payment, a redacted bank statement showing where the charge has hit your account can be used to SUPPORT the inadequate receipt, but it can never replace the receipt entirely
- c. Comment on the ticket that you have added your receipts

### 6. Reimbursement (occurs within 10 days of Expense Report completion)

- a. The same procurement team member who created your Travel Authorization will complete the Expense Report to reimburse you
- b. An Expense Report will be submitted in PeopleSoft. You will once again receive an automated email asking you to approve the Expense Report. You must approve it first before it can move on in the approval process. If you do not approve the Expense Report, you will not receive reimbursement.

And that is it! If all these steps are followed, reimbursement for travel is generally quick, and sent directly to your banking account.

