Authority for Travel and Reimbursement

Authority for Procedure granted by [UWG PL #3004, Travel Reimbursement](http://uwg.policystat.com/policy/14570431/).

The University of West Georgia (UWG) follows Board of Regents (BOR) Business Procedures Manual, Section 4.1 Authorization for Travel with the following guidelines for travel at UWG and the State Accounting Office Policy & Procedure Manual for Travel-related expenses, Reimbursement, or Payment.

**A. Procedure**

Each individual (employee, non-employee, student) for whom a travel expense will be paid or reimbursed is encouraged to obtain written approval prior to the beginning date of the anticipated travel. However, written authorization is at the discretion of the individuals’ approver or higher administrative authority with the exception of the following (which require the applicable completed and approved Travel Authorization form).

An Employee Travel Authorization form is required to be submitted for all travelers falling under the umbrella of the Provost. [Travel utilizing restricted project funds will require written approval from the Office of Research and Sponsored Projects](http://uwg.policystat.com/policy/14570431/).

**The individual will seek written approval to travel, from the appropriate authority, for the noted exception circumstances listed below.**

- Lodging more than 50 miles from their residence
- Prepaid Lodging
- Prepaid Airfare through West Georgia Travel Agency contract
- Job candidate travel reimbursement
- Student Group/Team Travel and Study Abroad Travel
- Direct Bill local (Carrollton) hotel lodging reservation procedure
- Fiscal year end travel fund encumbrance process
- Direct Bill Enterprise Rentals (Authorized Departments Only)
The individual will seek written approval to travel, from the appropriate authority, for the noted exception circumstances listed above.

Travel utilizing restricted project funds will require written approval from the Office of Research and Sponsored Projects.

**B. Restrictions**

**C. Event Registration**

Utilize a procurement card (p-card) or Check Request form when registering for an approved event (conference, training, retreat, etc.) for UWG employees, student groups, and non-employee attendees.

When the preferred methods of payment are not accepted by a vendor, out of pocket expense requests should be submitted (see section C. Reimbursements) with all supporting documents within 45 days of the event.

Check Request forms

1. Complete all applicable areas of the form and obtain approval signatures of the respective fund source(s). If an approver is also an event attendee, the approval signature of the next level-up is required.

2. To assist with timely processing, verify and/or include the following before submitting requests:
   
   i. The vendor is active in the Vendor Share database (Travel Services can assist if needed), including the correct vendor number, name, and address.
   
   ii. List the event date(s), note if virtual or location of the event (city/state), and names of attendees.
   
   iii. Authorized approver signature(s) over the fund source(s).
   
   iv. Full chart strings listed and funds available.
   
   v. Supporting documentation (travel authorizations for those employees under the Provosts, Student Groups, and non-employees; registration forms showing the dates, location, and amount of event; and, if before the event date, UWG affiliation of attendees).
   
   vi. Direction for payment - i.e., send to vendor - hold for department pick-up - etc.

**Restrictions**

Individuals should not pay for another individual's expenses unless that individual is part of a University group (Team or Studies Abroad).

**D. Reimbursements**

Employees must first register for a PeopleSoft Financials account to complete an electronic expense
reimbursement request. (See attachment, Instructions for Registering for a PeopleSoft Account). Note: Registration for PeopleSoft access may take up to 24 hours for processing. Contact Information Technology Services (ITS) with any login or password issues.

Employees with an active PeopleSoft account:

- Navigate to the GeorgiaFIRST Financials webpage (https://www.usg.edu/gafirst-fin/).
- Click on the GeorgiaFirst Self-Service button to enter Travel and submit all supporting documentation for payment review.

Note: Non-employees should manually submit travel forms and related documentation to travel@westga.edu. For candidate travel reimbursement, see UWG PL 3004 associated procedure, Candidate Travel.

Forms

The following related forms are available on the Controller’s Travel Service Work West Webspace (one USG login required).

- Travel Authorization - Employee
- Travel Authorization - Non-Employee
- Cost Effective Worksheet Tool
- Student Group Travel Authorization Form
- Non-Employee Travel Expense Form
- Travel Cash Advance Request
- Cost Effective Transportation Form

The following form is available on the Purchasing Services Work West Webspace (one USG login required)

- Check Request Form (general forms)

Approval Signatures

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<tr>
<th>Step Description</th>
<th>Approver</th>
<th>Date</th>
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