

# Travel Authorization Procedures

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6.2

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Administrative

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Policy Owner:

Accounts Payable

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## Purpose for Policy:

The purpose of this Policy is to provide guidelines to Georgia Tech employees for payment of travel expenses in an efficient, cost effective manner, and to enable Georgia Tech travelers to successfully execute their travel requirements in a timely manner, while also ensuring compliance to regulations for the Institute.

## Policy Statement:

All employees traveling for the performance of official duties and entitled to reimbursement for travel expenses incurred must have **prior** authorization from the department head or Dean (or their designated official) for the performance of travel. In no case is a subordinate authorized to approve travel for his/her superior.

Approval attests to the necessity of the travel and ensures that anticipated travel expenses are reasonable in nature and amount.

## Scope:

All Georgia Tech employees, (includes faculty, staff, students and employees) travelling on behalf the Institute and seeking reimbursement.

## Definitions:

**Employee** - Any Georgia Tech employee, whether temporary or permanent, who is paid through Georgia Tech payroll.

**In-State Travel** - Travel within the borders of Georgia.

**Out-of-state Travel** - Includes any travel outside the state of Georgia, including foreign travel.

## **Procedures:**

### **Declaration of Outside Professional Activities**

All employees traveling on behalf of Georgia Tech must declare any external professional activities or vacation associated with business trips. Additionally, employees are required to report any external activities in the Conflict of Interest (eCOI) System.

### **Travel Authorization**

Travel authorization (TA) is required for any employee travelling outside the state of Georgia, including international travel on behalf of the Institute. Travel authorization must be obtained prior to the first day of travel.

#### **Travel Authorization via the Institute's Financial System**

All out of state Travel Authorization is to be completed electronically through the Institute's Financial System. Electronic workflow approval by the supervisor (or their financial approval delegate) and the department financial approver is required prior to the 1st day of travel. It is not necessary to print the Travel Authorization for inclusion with the Expense Report. For domestic trips, the traveler's approval may be delegated to the preparer and the unit financial approver. For international trips, the traveler must complete the International Questionnaire.

#### **Travel Authorization via the Paper Travel Authorization Request Form (TAR)**

In cases when the completion of the Travel Authorization Form prior to the travel is impractical or impossible, email communications, notes of phone conversations, etc., between the traveler and the individual authorizing the travel, may be printed and attached to the paper TAR as evidence of prior authorization to travel. Both the approval signature and traveler's signature may be delegated, but in all cases must be approved prior to trip initiation.

In either case, if the Travel Authorization was not approved via the Institute's Financial System, the paper TAR must be scanned and included with the barcode expense report documentation.

#### **In-State Travel**

Travel Authorization is not required for in-state employee travel. Campus units may require that a Travel Authorization be completed for all in-state travel within their unit to meet their business needs. Approval to travel within the state of Georgia, or just beyond the state borders, on a regular or continual basis may be given as a blanket routine travel authorization. This may be maintained as an internal list in department files, or may be granted based on the employee's primary job duties that include a business need to travel in-state. Employees whose headquarters/primary work location is outside of the state of Georgia are not required to complete a Travel Authorization for routine travel within that state.

#### **International Travel**

Georgia Tech strongly recommends against, but does not prohibit, travel to countries where the U.S. Department of State has issued an official Travel Warning (a Travel Warning is distinct from a State Department issued Public Announcement), or where there is other reliable information of significant health or safety risks. The final decision about making a trip to such a

country is up to the individual making the trip; however, Georgia Tech reserves the right to require the execution of an appropriate release or waiver before permitting such travel. This recommendation is directed toward individual travelers in the following categories: faculty, staff and graduate students. Faculty/Staff taking students on international travel will require prior approval from Office of International Education.

For further information about U.S. Department of State travel advisories, please consult the [Department of State List of Current Travel Warnings](#). Georgia Tech will review on a case-by-case basis plans for travel using state or sponsored funds to countries for which travel warnings have been issued.

The International Questionnaire is used as an initial screening for all international travel. As part of the Travel Authorization process, the traveler must complete the questionnaire on-line in the Institute's Financial System prior to final submission of the travel authorization. The questionnaire is automatically routed to the Office of Legal Affairs for review. This questionnaire should be submitted to the Office of Legal Affairs not later than thirty (30) days prior to the desired departure date for travel to a foreign country and 45 days for travel to sensitive countries under travel advisories or involving the shipment of equipment or biological materials. The earlier the proposed travel is reviewed, the greater likelihood of processing reviews without delay.

Prior to international travel faculty should become aware of applicable export laws, regulations and risks associated with international travel. Several key reference sources include:

- [GT Export Web site](#)
- [U.S. State Department](#)
- [U.S. Department of Homeland Security](#)
- [Centers for Disease Control and Prevention](#)
- [World Health Organization](#)
- [U.S. Department of Agriculture](#)

Employees must comply with U.S. laws and regulations when traveling internationally for official business on behalf of Georgia Tech business. International travel being sponsored by the Federal Government must be ticketed by U.S. Flag carriers. See section "[Foreign Travel](#)" for more information regarding the Fly America Act.

### **No-Cost-To-Tech Travel**

In situations where no charges to the Institute are involved, but the purpose of the trip is official business or Institute related, a paper Travel Authority Request Form may be approved and retained in the traveler's department. The Institute's Financial System will not permit a \$0 Travel Authorization.

No export review is required for employees traveling internationally on vacation or attending conferences at their own expense

### **Itinerary Changes**

If the itinerary of the trip fundamentally changes (location or business purpose) from that stated on the original Travel Authorization (TA) and the original TA has been approved, a new TA should be completed, and the original TA should be cancelled.

### **Forms**

Links to forms needed to meet travel authorization requirements:

1. Travel Authorization via the T&E System: <https://techworks.gatech.edu/>
2. Report any external professional activities in the eCOI System: <https://ecoi.research.gatech.edu/researcher/welcome>
3. Paper Travel Authorization Request Form: [Travel Authority Form](#)

### **Responsibilities**

#### **Traveler**

The traveler is responsible for ensuring appropriate travel authorization and supporting documentation is obtained prior to the first day of traveling to perform business duties on behalf of the Institute. The traveler is also responsible for declaring any external professional activities, vacation associated with a business trip and reporting all external activities in the Conflict of Interest (eCOI) System.

#### **Preparer**

The preparer prepares the travel authorization on behalf of the traveler and is responsible for ensuring appropriate travel authorization and all required supporting documentation is obtained prior to the first day of travel. Preparer also ensures the traveler declares any external professional activities or vacation associated with a business trip and reports all external activities in the Conflict of Interest (eCOI) System.

#### **Approvers**

##### **Spend Approver/Supervisor**

Spend Approver/Supervisor is responsible for reviewing the travel authorization prior to approval to validate the appropriateness, business purpose of the trip, trip is allowable, cost reasonableness, and ensuring all required supporting documentation is submitted. Spend Approver/Supervisor is also responsible for ensuring any external professional activities declared by traveler are reported in the Conflict of Interest (eCOI) System.

#### **Delegates**

Delegates act as proxies on behalf of the supervisor and have the same responsibilities as the supervisor.

**Finance Approver**

Finance Approver is responsible for reviewing the travel authorization prior to approval to validate the funding source and project number(s), the appropriateness and business purpose of the trip, validate trip is allowable, cost reasonableness, and ensure all required supporting documentation is submitted. Spend Approver/Supervisor is also responsible for ensuring any external professional activities declared by traveler are reported in the Conflict of Interest (eCOI) System.

**Travel Administrators**

Travel Administrators are responsible for the setup of the travel approval workflow for their departments and ensuring any changes to their organizational structure (new hires, terminations, changes in reporting/responsibilities, etc.) are updated in the workflow.

**Enforcement**

All Georgia Tech employees, (includes faculty, staff, students and employees) traveling on behalf of the Institute are to adhere to the Travel Authorization Procedure Policy. Employees who are in violation are at risk of not receiving reimbursement for travel expenses incurred, and are subject to disciplinary action up to an including termination of employment.