

# Travel

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## University of Saskatchewan Policies

### Travel

Category:	Operations and General Administration
Responsibility:	Associate Vice-President (Financial Services)
Authorization:	Board of Governors
Approval Date:	September, 1979
Reformatted:	March 30, 2001
Amended:	August 1990; July and December 2008

### Purpose:

The purpose of this policy is to ensure that travel charged to funds administered by the University has been authorized in advance, is fully documented, and that the related expenses are in compliance with the approved expenditure procedures and guidelines.

### Principles:

The policy and related procedures, guidelines and forms have been designed to aid travelers and their supervisors in considering the implications of, and plan for, an individual being absent from regularly scheduled duties, to facilitate travel arrangements, to advise individuals of eligible expenses and applicable rates, to ensure that expense claims can be processed in a timely manner and to facilitate processing of insurance claims, if applicable, as quickly as possible.

As a publicly funded institution, the University is accountable for its actions, for effective and efficient stewardship of its resources and for ensuring that these resources are deployed or leveraged in the best way possible.

### Scope of this Policy:

This policy applies to all individuals whose travel is paid for by funds administered by the University of Saskatchewan.

This policy addresses obtaining authority to travel in advance of the travel, approved travel agents, travel expense guidelines, travel claim procedures, travel accident insurance, and is also linked to the following policies:

- # [Hospitality and Working Lunches](#)
- # Recruitment & Relocation Expenses – to be developed

Within this policy and related guidelines, the use of terminology such as department head, dean and college are considered to also refer to director, head of administrative unit and administrative unit/division.

### **Policy:**

An Authority to Travel form must be completed in advance of all Out-of-Province travel and In-Province Tri-Council funded travel.

In the case of travel funded by an external agency, the grantee must also authorize the travel. If the grantee is the individual who is traveling, the travel must be authorized by their supervisor.

Travel expenses must relate to University business, e.g. teaching, research, professional development, administration, etc.

Travel expenses being incurred should be the most economical that can be arranged.

Travel expenses must be supported by appropriate original documentation.

Travel expense reimbursement requests must be made on the appropriate claim form and on a timely basis; only one claim should be submitted for each trip.

The claim form must be approved by the person having signing authority for the fund to which the travel costs are being charged. If the signing authority is the person being reimbursed, their supervisor or designate, must approve the claim.

Where travel is funded by an external agency (e.g. research grant or contract) and the agency's guidelines are more restrictive than the University's Travel Expense Guidelines, the agency's guidelines will take precedence.

Travel Advances are not normally provided but may be issued in special situations.

Under no circumstances are personal expenses, personal travel expenses or personal entertainment expenses to be charged to any funds that are administered by the University.

### **Responsibilities:**

Individuals and their supervisors are responsible for ensuring that all University related travel has been properly authorized and is fully documented.

The individual/traveler is responsible for making the most economical travel arrangements available under the circumstances.

For travel on research grants or contracts, the onus is on the researcher to ensure that the granting agency guidelines/contract allows travel and to ensure sufficient funding exists to pay the travel expenses.

It is the responsibility of the Dean, to ensure the appropriateness and reasonableness of the expenses being claimed. This responsibility may be delegated to a Department Head or a grantee, in the case of travel funded by an external agency.

The Financial Services Division is responsible to the Vice President (Finance & Resources) for the administration of this policy and related procedures/guidelines.

## **Non-Compliance:**

Non-compliance with this policy will result in:

- # adjusting the claim to the approved travel expense guideline amounts, or
- # not processing and returning the claim if the claim does not have all required supporting documentation attached or it has not been properly approved.

If, during a subsequent audit, it was determined that the claim, or a portion of the claim, was not an acceptable charge against a particular fund, e.g. a research fund, then the declined amount would become the responsibility of the college to resolve.

Following due process, the University may take one or more of the following actions if it was determined that the claim, or a portion of the claim, was fraudulent:

- # Legal action that could result in criminal or civil proceedings.
- # In the case of students, disciplinary action under the Council regulations for Student Academic Dishonesty and/or Non-Academic Student Discipline and Appeals.
- # In the case of employees, disciplinary action up to and including termination.

## **Procedure Summary:**

Authority to Travel - The Authority to Travel form, and the help document designed to assist you in completing the Authority to Travel form, can be found on the FSD web site at <http://www.usask.ca/fsd/resources/forms/index.php>

Travel Expense Guidelines - A comprehensive list of eligible expenses and applicable rates and explanations can be found on the FSD web site at [http://www.usask.ca/fsd/resources/guidelines/travel\\_expense\\_guidelines.php](http://www.usask.ca/fsd/resources/guidelines/travel_expense_guidelines.php)

Travel Expense Claim - The Travel Expense Claim form and the Travel Expense Detail form, and the help document designed to assist you in completing these forms, can be found on the FSD web site at <http://www.usask.ca/fsd/resources/forms/index.php>

Contact: Director, Payment Services, Financial Services Division, (966-4599)