Procedure for Travel Authorization

NOT IN EFFECT UNTIL JANUARY 1, 2027



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Responsible Unit: Office of the Associate Vice-President (Finance) and Chief Financial Officer

Definitions

Extraordinary Circumstances: Unforeseen, non-discretionary, and verifiable emergencies beyond a traveler's control, such as but not limited to illness, death in the family, natural disaster, labour dispute, etc.

Travel Deviation: A departure from University travel policies or procedures that requires authorization by both the Unit Head and Vice-President (Finance and Administration), including deviations for expenses related to specific cultural practices or medical reasons.

Traveller: any member of the University Community making a claim under the terms of University travel policy and procedures.

Unit Head: Those holding the responsibility of a unit's budget and activities (or their delegate), with the authority to approve travel and the ability to assess that such travel is necessary, reasonable, legitimate, and appropriate.

University: Memorial University.

University Community: Comprised of all people who teach, conduct research, study, or work at or act under the auspices of the University and includes, without limitation, all employees, students and any other person(s) while they are acting on behalf of, or at the request of, the University.

Visitor: A person invited by the University to temporarily teach, conduct research, collaborate or consult, or act as a special guest, including but not limited to distinguished professors, visiting researchers, scholars, visiting government officials and other guests of honour.

Procedure

1. General

Before committing resources to travel, a Unit Head or host Unit Head must approve the appropriate travel request/approval form as per the *Travel Expense Management Policy*.

2. Authorization Forms

2.1. Units planning to fund the travel of a Visitor or eligible interview candidate will submit the *Visitor Approval Form*, with assistance from the Visitor or candidate where required. All other Travellers will complete the *Travel Request Form*.

2.2. Travel outside of Canada may require additional steps for authorization as per the *Travel Outside of Canada Policy* and its associated procedures.

2.3. When travel is funded by more than one Unit Head, Travellers will seek the authorization of all other applicable Unit Heads before final submission to their own Unit Head (or host Unit Head in the case of Visitors).

2.4. Some travel may require the completion of additional forms as dictated by the regular process of the unit before travel is approved, such as applying for funding from limited professional development funds. Consult with your Unit Head as to what other approvals may be required to receive funding for travel.

2.5. A unit's financial administrators must be notified when cancelling authorized travel, whether expenses have been incurred or not.

3. Requested Information for Travel Authorization Forms

3.1. Travellers and/or those assisting Travellers with their arrangements will provide travel details and estimate travel expenses as accurately as possible to confirm expenses are reimbursable, ensure adequate funding is available, and expedite the claims process after travel. Official quotes are not required except when requesting a Travel Deviation (see section 5).

3.2. A travel request form typically requires the Traveller's contact information and any information that will assist the Unit Head in their review, such as:

- a brief itinerary for each day of travel (i.e., dates, location(s), etc.)
- appropriate FOAPAL(s) (consult a financial administrator when unsure)
- required transportation and estimated cost for each type
- nights of accommodation and estimated cost
- per diem meal allowances for the trip
- incidental allowance for the trip
- hosting expenses (as per *Hosting Policy*)
- any requirements of the *Travel Outside of Canada Policy*
- A SIN number (only when a Traveller will receive a stipend or honorarium)
- any other foreseeable expenses

3.2 To promote greater understanding of University travel standards and claimable expenses, units are encouraged to assign travel planning assistance to Visitors or those in their unit who are first-time or infrequent Travellers. Travellers are also encouraged to reach out to Financial Services for further guidance.

4. Review Allowable Expenses and Reimbursement Rates

4.1. The *Procedure for Travel Expense Management* outlines payment methods, travel standards and allowable expenses, while the *Schedule of Reimbursable Expenses* outlines set rates for hosting, incidentals, meals, private overnight accommodations, and personal vehicle per kilometer allowance.

4.2. Depending on the nature of travel, other applicable procedures for reference may include *Procedure for Relocation of Postdoctoral Fellows, Procedure for Familiarization Visits, Procedure for Pre-employment Interview Expenses, Procedure for Relocation and Removal and Procedure for Visitor Travel*.

4.3. Other travel provisions may also be outlined in third-party funding, employment or collective agreements.

5. Travel Deviations

5.1. When costs are expected to be incurred outside of the provisions of the *Travel Expense Management Policy*, all other related policies and procedures, or any third-party funding, employment or collective agreements, the Traveller may submit expenses for Travel Deviation consideration.

5.2. Travel Deviation requests must include:

- The out-of-policy **expense type(s)** expected to be incurred (e.g. premium airfare)
- The **amount** of the expense anticipated in comparison to the in-policy expense costs (e.g. a premium airfare at $1,500 versus an economy fare at $800).
- A **brief description** of why the expense is required and any associated financial or risk implications.

5.3. Travel Deviation requests will be submitted for preliminary review by the Unit Head. If authorized by the Unit Head, the request can be forwarded by memo from the Unit Head to the Vice-President (Finance and Administration) (VPFA) as a recommendation for final authorization. Deviations for the VPFA, President, Board of Regents members or Chancellor shall be requested via the authority that approves travel expenses for that role.

5.3.1. Out-of-policy expenses incurred without prior authorization while travelling can be requested for consideration during the reimbursement process by attaching the required information (section 5.2) to the travel claim for Unit Head review and recommendation for approval to the Vice-President (Finance and Administration).

6. Requesting a Travel Advance

6.1. An advance is a cash payment provided to an individual to cover anticipated expenses only after all other University payment options have been exhausted.

6.2. Travellers who are employees or graduate students may be eligible for a travel advance for:

- Seat sale airfare.

- Expenditures that are unlikely to be paid by credit card due to their nature or transactional practices of the destination.
- Remote or long-term travel where expenses cannot be claimed in a timely fashion to meet expense payment deadlines.

6.3. Such expenses should be estimated on the Travel Advance Request Form and submitted with the Travel Request form.

6.4. Those not typically eligible for an advance and would like to be considered for one may complete the Travel Advance Request Form. Such requests will require authorization from both the Unit Head(s) funding the travel and the Office of the Associate Vice-President (Finance) and Chief Financial Officer.

6.5. All travel advances must be accounted for and claims submitted within ten (10) business days of completing a trip.

6.6. In lieu of an advance and when deemed appropriate to assist with financial constraints, a unit may issue a purchase order for flights only when booked through the University's Travel Service provider, and/or commercial accommodations with an appropriate invoice from the provider.

Related Documents

Procedure for Relocation of Postdoctoral Fellows
Procedure for Familiarization Visits
Procedure for Pre-employment Interview Expenses
Procedure for Relocation and Removal
Procedure for Travel Expense Management
Procedure for Visitor Travel
Schedule of Reimbursable Expenses
Travel Advance Request Form
Travel Request Form
Visitors Approval Form

Policies using this Procedure:

Hosting Policy
Travel Expense Management Policy
Travel Outside of Canada Policy