

TRAVEL APPLICATION FORMS

(1) General Information

Obtain a supply of these forms from Sam Houston Press on campus, or use the FileMakerPro.

A Travel Application form shall be prepared by a SHSU employee (or in the name of a prospective employee) before a trip begins for the purpose of obtaining official advance approval to travel on behalf of SHSU. This form shall show whether or not reimbursement for travel expenses will be requested. Note that advance approval is required. A Travel Application form submitted after the beginning date of travel is in violation of travel guidelines and subject to rejection. The application must include a statement as to how travel will benefit Sam Houston State University. The statement, "Travel will benefit Sam Houston State University" is not satisfactory.

All information appearing on SHSU forms must be true. False Information reported on SHSU forms is subject to prosecution according to state regulations.

All Information appearing on a Travel Application form is required to agree with its corresponding Travel Voucher Form. In case of changes, contact the Travel Office before the travel takes place. Changes may require justification or, in some cases, a new Travel Application form.

Photocopied Travel Application forms submitted instead of NCR forms are not acceptable for processing.

Complete the information required on this form in a typed fashion.

All SHSU trips must be approved on a Travel Application form in advance of the trip. The claimant's immediate supervisor is required to review and sign this form to designate approval to travel, the account manager, and Dean must approve travel. If the travel is on a Grant Account, then Contracts and Grants must also approve prior to travel date. Foreign travel must be approved by all the above and The Vice President, Dr. Gaertner, and the Governor's Office. The initiating department is responsible for submitting the Travel Application form to the Travel Office before the date of departure. Travel Application forms received in the Travel Office after the date of departure, may result in non-payment of travel expenses.

When traveling on a SHSU-related trip and not claiming reimbursement from SHSU for travel expenses, a Travel Application form is required to be on file in the Travel Office. This verifies that the claimant is on official business in case of emergency, or if questions arise later. Also, the claimant is still entitled to use contracted rates for hotel, airfare, and car rental. The Travel Application form will be assigned a travel number for this purpose.

(2) Canceled Trips

If a Travel Application form has been processed and then the trip is canceled, the Travel Office must be contacted as soon as possible to clear the travel record. If

funds have already been encumbered from an account, the money can be released immediately so that it may be used for something else.

(3) Travel of More Than 3-Week Days

If one SHSU-related trip exceeds three weekdays in length, a letter of explanation is required to accompany the Travel Application form to justify the extended absence and must be approved by Dr. Gaertner. (Note: for the Division of Academic Affairs, department chairs have been authorized to approve.)

(4) Combining In-State and Out-of-State Trips

One Travel Application form shall be submitted for the trip, if this is continuous travel. The University's Board of Regents requires specific reporting of out-of-state travel information.

(5) Unapproved Travel Application Form

If a Travel Application form is not approved by an Account Manager, Chairperson, Director, Dean, Vice President, or President, the Travel Application form must be returned immediately to the SHSU employee with whatever notation is necessary to convey the message that the trip has not been approved so that travel expenses will not be incurred for this trip. Also, anyone who had previously approved the Travel Application form must be notified that approval will not be granted.

(6) Outstanding Encumbrances on Travel Application Forms

It shall be the responsibility of the Account Manager to notify the Travel Office to clear any encumbrance balances remaining in an account after travel has been completed or canceled.

(7) Multiple Trips by Same Person

Instead of preparing one Travel Application form for each trip, a SHSU employee may process one Travel Application form to cover a group of SHSU-related business trips.

All trips shall be for the same purpose of travel. This travel may take place either to the same destination, or multiple destinations, which shall be stated on the Travel Application form.

All trips shall occur during the same time period (such as a semester or month), which shall be stated on the Travel Application form (showing beginning and ending dates of travel period). All trips shown on a Travel Application form must take place within the same fiscal year.

If travel will take place to multiple destinations over multiple dates, show the dates when travel will occur to each different destination on the Travel Application form.

If sites to be visited shall be determined while the travel is taking place, the name of the nearest major city being visited should be listed and include this statement,

"and area," so that the additional sites visited shall be covered by the Travel Application form. (Example: Conroe, Houston, and area.) When "and area" is noted, each specific town to be visited will not have to be listed by name on the form, as long as all towns visited are in the area of those towns specified on the Travel Application form.

If additional room is needed to show information, attach a separate sheet to the Travel Application form for this purpose.