

# PURDUE

UNIVERSITY

VICE PRESIDENT FOR BUSINESS SERVICES  
AND ASSISTANT TREASURER

April 3, 2013

To: Directors of Financial Affairs, Business Managers, and Sponsored Program Account Managers

Fr: James S. Almond



Re: Travel Approval Delegation

In accordance with Executive Vice President and Treasurer Memorandum A-35, Delegation of Signature Authority for Approving the Obligation of University Funds for Procurement of Services, Supplies and Expenses, and Capital, the delegation of source of funds approval for travel has been revised as follows:

- Authority to grant fiscal approval for domestic and foreign travel on all sources of funds is delegated to the business office. However, there are sponsors which require pre-trip approval.
- SPS is responsible for:
  - maintaining this list of sponsors,
  - providing this information to the business office,
  - ensuring it remains accessible through the life of each sponsored project.
- The fiscal approver is responsible for checking this list prior to approving travel. If pre-trip approval is required, the fiscal approver will work with SPS to obtain prior approval from the sponsor before executing final fiscal approval for the trip.

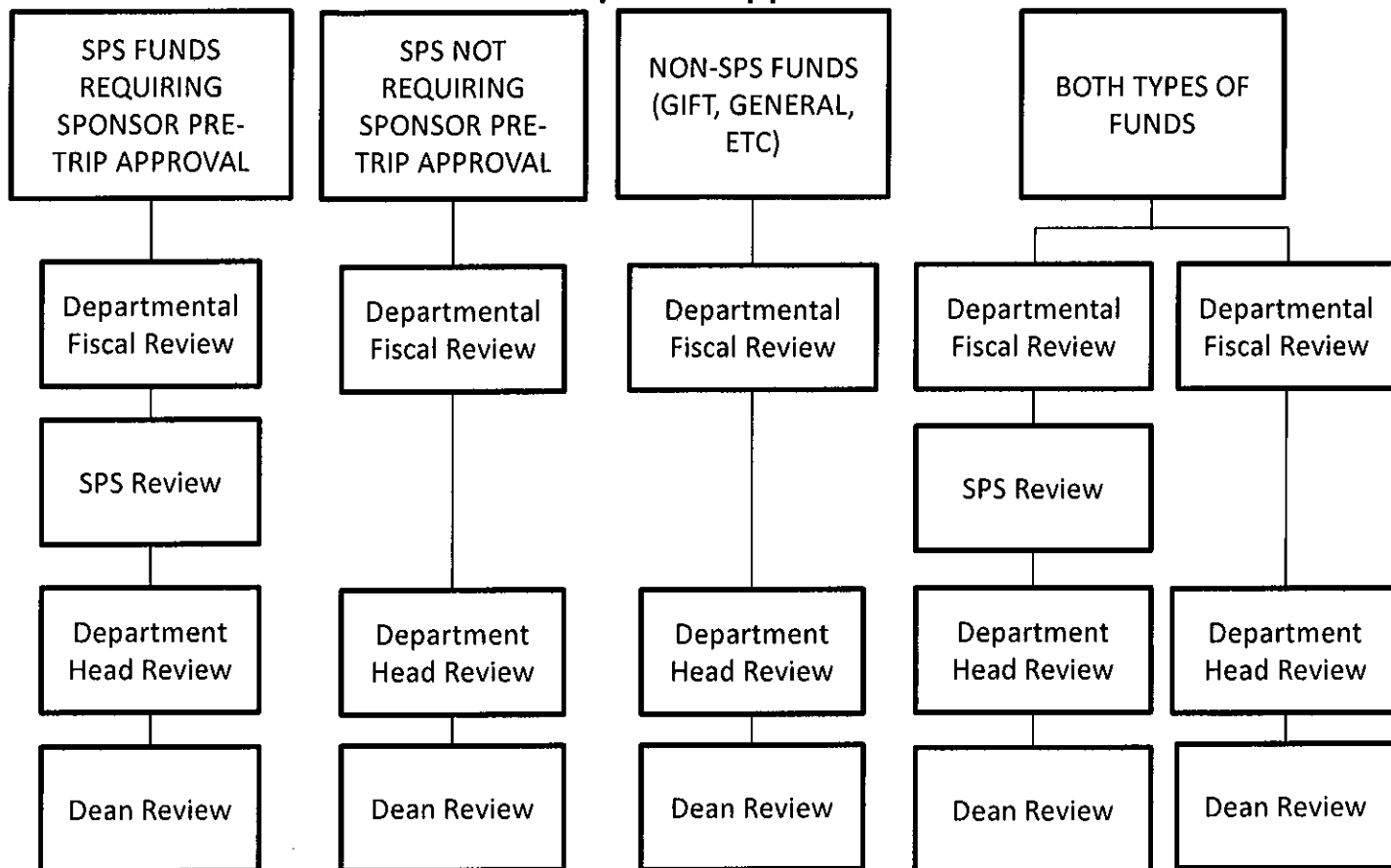
Delegations to individual business officers will be determined by the level of each person's existing Comptroller authorization. This delegation does not replace the programmatic approval delegated to the deans, vice presidents and their designees.

When reviewing the travel request, business office staff should verify the allowability and reasonableness of the travel. This includes verifying the availability of funds for the trip and assuring that the trip falls within the intent of the funds being used. The travel request should include a description of how the travel benefits the program incurring the cost. This statement should be sufficient to justify the allocability of the charge; if necessary, additional information regarding the need for the trip should be included.

Any questions regarding this delegation should be addressed with the University Travel Office.

c: C. L. Lapinskas  
M. C. Gaisbauer  
C. J. Martin  
M. R. Ludwig

## Travel Request – Approval Flow



**Departmental Fiscal Review** can be handled within or outside of the Concur system. The Fiscal Reviewer is responsible for checking the list of existing accounts in which sponsors require pre-trip approval. The list can be found here: <http://www.purdue.edu/business/sps/> If the traveler will be charging one of the accounts on this list, it is the responsibility of the Fiscal Reviewer to notify SPS, who will work to obtain pre-trip approval from the sponsor.

- Fiscal Review should verify the allowability and reasonableness of the travel. This includes verifying the availability of funds for the trip and assuring that the trip falls within the intent of the funds being used. The travel request should include a description of how the travel benefits the program incurring the cost. Fiscal Review will verify that the University travel policy is followed.
- When notified of upcoming travel on a grant with travel restriction, the business office will email the corresponding SPS Post Award area the following information: Grant, Traveler, Destination, Duration, and Purpose of travel. If additional information or a specific format of the request is required by the sponsor, SPS will work with the business office to acquire what is needed.

**SPS** is responsible for maintaining the list of sponsors referenced above. SPS is also responsible for ensuring this information is provided to the business office and remains accessible through the life of each sponsored project. SPS Review is needed when the sponsor requires pre-trip approval.

- SPS will run a report daily that details all travel requests on sponsored research. It is the responsibility of each Post Award area to ensure that appropriate approvals have been obtained for any sponsor restricted travel. If a trip appears on the report that requires sponsor approval and SPS has not been previously contacted by the Department, SPS will communicate this to the Department and PI and proceed with obtaining sponsor approval.
- SPS will work directly with the sponsor to secure prior approval for the travel. There may be times when the PI has gotten approval from the sponsor in advance of the trip. This is acceptable, and the documentation should be provided to SPS for review and inclusion with the grant file.
- SPS will notify the business office via email once sponsor approval has been received or denied. After approval is received, the business office will copy and paste or attach the email approval to the comment section of the header.

**Department Head and Dean** reviews will determine whether the trip is necessary, if it will truly benefit the work of the individual traveling, and other issues related to the administration of the department.