

CAS Travel Advisory

Ten steps for making the best use of the College's professional travel policies and practices.

STEP 1. Know the **College's travel policies.**

The College has guidelines for travel for all members of the College community (Faculty Handbook IX.G. [September 2004 edition]); these guidelines are sometimes determined by federal or state government, sometimes by standard accounting practices, sometimes by Loyola's values and past practices. The College also has more specific guidelines for faculty travel (VIII.C.4. [September 2003 edition]); these guidelines are specified in turn by the policies and practices of the Deans' offices as well as individual departments. Policies on all these levels – the College, the academic division of the College, the Deans' offices, and individual departments – periodically change. For faculty to take full advantage of these policies and practices, it is important that faculty know and follow them.

For professional travel in particular, “[t]he College encourages attendance at scholarly or professional meetings and conferences by providing funds for travel through the departmental budgets. In addition, the Deans may supplement such support, if the faculty member is presenting a paper. Ordinarily the Dean, the Chair, and the faculty member will work out the payment of the expenses involved. A faculty member should consult the Department Chair about the necessary form and receive approval prior to attending a conference. Travel expenses must be consistent with Loyola Travel Policy [IX.G (See IX-2).” (Faculty Handbook VII. C. 4. [September 2004 edition]).

STEP 2. **Plan your travel as much in advance as possible**, particularly if you are seeking funding support.

The Deans and Chairs have travel budgets that must be distributed to faculty over the course of the entire academic year. The sooner each knows your plans, the better each can let you know how much support he or she can offer. Many department Chairs ask faculty for their travel plans for the year at the beginning of the academic year; this can also help the Dean fairly allocate travel support. (Of course, some travel plans can be planned more in advance than others. But faculty should not count on funding for last-minute plans.)

STEP 3: Use the **Loyola College Travel Program** website to help you plan the purpose, destination, dates, and proposed budget for your trips. The current web link is Logistics , although this link changes. This link includes information about such matters as U.S. Government per diem rates

STEP 4. **Discuss with your Chair what the department can contribute to your travel.** Most departments (like the Dean) give priority to travel that contributes directly to scholarly activity, particularly publication.

Department travel policies for spending department funds should be clear to all department members; basic departmental guidelines and priorities should be written, as needed.

STEP 5. If you wish to **request travel funds from the Dean**, fill out the current “Faculty Travel Funds Request Form” (available on the CAS website, under “information for faculty”)

Once a faculty member has learned from the Chair the amount of available departmental travel funds, the faculty member may request funds from the Dean by filling out the most recent edition of the CAS Dean’s “Faculty Travel Funds Request Form”, obtaining the Chair’s signature, and forwarding it to the Dean’s office. This form is available on the College of Arts and Sciences web site, under “information for faculty”.

It is necessary to fill out this form even if the Dean has approved a trip orally or in an e-mail. The form requires a faculty member to specify whether the trip is for a peer-reviewed paper; if the travel is not for such a paper, faculty are asked to provide a more detailed explanation of the reason for the requested trip. The Dean ordinarily funds half of the expenses to conferences at which the faculty member is presenting a paper. But the Dean and Vice-President for Academic Affairs in consultation with Chairs can also provide some support for travel that helps the department or College’s efforts at self-evaluation of its teaching and research

Some do NOTS that will help expedite approval: Use the most current “Faculty Travel Funds Request Form”; do NOT use an old form.

STEP 6. You will receive an **e-mail approval from the Dean** of your request for College funds. If the “Faculty Travel Funds Request Form” is correctly filled out, the e-mail will be sent within two weeks CHECK of when the Dean’s office receives your request. If you do not hear within this time, please call Sharita Planter (2563). Please do NOT submit a second request for the same trip.

STEP 7. Plan to submit your receipts for reimbursement **within 60 days** of the time you complete your trip. Travel during May should be submitted before May 30, if at all possible.

This time frame helps faculty remember the details of their trip. It also enables the Dean’s office to spend unexpended money on other faculty travel. If expenses have not been submitted within 60 day, the Dean’s office will assume that we can make use of the funds for other faculty travel

STEP 8. Faculty must gather all receipts, fill out the current “**Travel Expense Reimbursement**” form (available at), obtain the Chair’s signature on any portion of the expenses for which the Department is paying, copy the form and receipts, and send the originals to the Dean’s office.

Please staple the original receipts to the “Travel Expense Reimbursement” form. The receipts must be “original” (not copies, or credit card bills), for the same sorts of reasons that the I.R.S. requires original receipts for business expenses. If you claim the current U.S. government per diem rate (see Loyola travel web site), you do not need meal receipts. The Dean’s office does NOT keep copies of these receipts, so it is important that you make a copy of all materials sent.

Some “do NOTs” that help expedite reimbursements: Please do NOT write in the greyed out areas of the forms, or spots marked “For Dean’s office use only”. Do NOT send in the Travel Expense Reimbursement form without receipts, or the receipts without Travel Expense Reimbursement form. Use one Travel Expense Reimbursement form for each trip; do NOT put two trips on a single form. Include only receipts; do NOT include brochures or conference publicity. Tear off tabs do NOT count as “original receipts”. Credit card bills often also do NOT provide the sort of detail required for accounting.

Step 9. If you do not receive your payment within 3 weeks of submitting your reimbursement, please call Sharita Planter (2563).

Step 10. Let Suzanne Keilson know if you have any suggestions for improving this “CAS Travel Advisory”.