



Policy 2.93

Travel Expense Reporting, Reimbursement, and Payment

Responsible Official: Vice President for Finance/Chief Finance Officer

Administering Division/Department: Procurement Services

Effective Date: February 14, 2013

Last Revision: August 20, 2014

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Overview

The purpose of this document is to describe the process for individuals requesting reimbursement or payment of travel expenses and/or payment of their Corporate Card while traveling on behalf of the University.

Applicability

The Travel Policies apply to faculty, staff, students, and non-employees traveling on behalf of the University and seeking reimbursement or payment for travel-related expenses from Emory University funds, regardless of the funding source.

Policy Details

Traveler Responsibility

Individuals traveling on behalf of the University should exercise good judgment when incurring travel expenses. Travelers are responsible for ensuring that incurred expenses and related reimbursement or payment requests comply with all applicable policies and authorizations and are supported with valid receipts and other documentation as required. Submission of the expense report affirms that these responsibilities have been met. Travelers are responsible for adhering to the expense reporting and reimbursement or payment process described below.

Responsibility of Higher Level Approvers

Higher Level Approver must ensure that:

- the traveler is aware of the Emory Travel Policy in advance of the travel;
- travel expenses were incurred while conducting authorized University business;
- travel expenses were necessary, reasonable and consistent with University policies and the stated business purpose;
- an expense report includes the required documentation; and
- travel expenses meet any and all Sponsored Program guidelines, if applicable.

Expense Reporting, Reimbursement, and Payment

Travelers are required to submit a completed Expense Report for all expenses related to a business trip.

- 1) Requests for reimbursement of personal funds used will only be considered after completion of the trip.
 - 2) Any extenuating (or unusual) expenses must be explained in the Expense Report.
 - 3) Accounting standards generally require that expenditures be reported during the fiscal year in which the expense was incurred. To facilitate timely reimbursement or payment and cost center reporting in the proper period, completed and approved Expense Reports should be submitted to Payment Services within 10 days after concluding the business trip.
 - 4) Corporate Card holders who pre-pay airfare, registration, hotel deposits, etc., should submit an Expense Report prior to the trip to avoid late fees.
 - 5) Expenses incurred by a group of individuals traveling together may be incurred by one person. A list of all travelers should be attached to the Expense Report.
 - 6) Reimbursement requests made during a current fiscal year resulting from travel expenses incurred in a previous fiscal year should not be submitted to Payment Services absent extenuating circumstances. With the exception of travel that occurs during the fiscal year changeover, extenuating circumstances which prevent submission at some point within the same fiscal year are expected to be rare. Circumstances that may justify an exception include:
 - Extended personal illness
 - Death in the family
 - Unanticipated extended leave of absence
 - Travel outside the country for an extended period of time if documentation cannot be readily sent to Emory
- Extenuating circumstances must be provided in writing and included in the Expense Report.

Related Links

- Current Version of This Policy: <http://policies.emory.edu/2.93>
- [Expense Report Procedures](https://www.finance.emory.edu/home/travel/expensing.html) (https://www.finance.emory.edu/home/travel/expensing.html)

Contact Information

Subject	Contact	Phone	Email
Procurement and Payment Services	Customer Care	404-727-5400	actspay@emory.edu

Revision History

- Version Published on: Feb 13, 2013 (*Changed title to add "Travel".*)
- Version Published on: Feb 13, 2013
- Version Published on: Mar 31, 2010 (*Original Publication*)

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