

# **MONTHLY TRAVEL AND EXPENSE REPORT**

Union Institute & University has specific policies regarding travel and related expenses incurred on UI&U authorized business. All Union Institute & University full- and part-time faculty and administrative personnel who are authorized to incur such expenditures as part of their assigned duties as employees of UI&U use this form.

1. **Use of the Travel Form:** To expedite payment and to provide the employee with an expense record, this form will be useful in reporting employee-incurred expenses.
  - a. Please attach all requested information.
  - b. Attach all original receipts.
  - c. Include any explanatory information including the names of individuals (other than the traveler) entertained on meal expenses.
  - d. Send the form to the Office of the Dean or appropriate Vice President for review and approval.
  - e. The approving office will forward the dated and approved form to the Business Office for payment.
2. **Frequency of Reporting:** This report is to be filed monthly. It can be used for individual trips, if the traveler so desires. (There will be no reimbursement for expenses submitted after sixty (60) days.
3. **Additional Clarification**
  - a. Be sure that your name and address (unless you are at UI&U) are legible.
  - b. Clearly identify what receipts are for and be sure no receipts are missing.
  - c. Prepare report in ink.
  - d. Send only original receipts (NO PHOTOCOPIES)
  - e. Do not report expenses more than sixty (60) days old.
  - f. Clearly identify the purpose of the travel, the location to which you traveled, and the dates traveled.

**EXAMPLE:**    Betsy Smith – Certification Meeting  
                         San Diego, CA  
                         August 2-3, 2008
4. Sign the form. Do not use outdated forms.

