

# VIMS TRAVEL AUTHORIZATION, TRAVEL ADVANCE AND LODGING EXCEPTION ALLOWANCE FORM DEFINITIONS

**Request Date** - Date travel request is submitted.

TS - Document number indicating that authorization is for a **specific** trip or for overnight travel.

TL - Document number indicating that authorization is for **local** travel, usually for routine work activities only.

Number of Employees Traveling – from your department.

**Name** - Personnel requesting travel approval. If the individual is not a VIMS employee, a VIMS employee must be named as individual responsible for verifying travel and ensuring appropriate documentation of travel activities supported by institutional funds.

**Banner ID #** - Traveler's 930 number.

**Department** – Affiliation of employee requesting travel approval.

**Phone Number** – Traveler's office telephone number.

**Travel Dates** – Must include beginning and ending dates, with any travel dates combined with leave noted.

**Banner Index** – Indicate amount to be charged to each Banner Index number and appropriate account administrator signature.

**Destination** - Specific location for travel request.

**Status** – If traveler is not an employee, note the name of the responsible VIMS employee.

**Type of Travel** – Select all that apply.

**Travel Purpose** – Indicate purpose.

**Foreign Travel** - Request must be accompanied by explanation of reason that this specific trip is beneficial to the Commonwealth **regardless of the source of funds supporting the travel.**

**Estimated Cost** – Is an estimate of major components of the planned travel expenditures. Expenses allocated to each Banner Index must include the amount to be charged and signature of the appropriate account administrator/Sponsored Programs Administrator(s) **prior** to approval of request.

**Travel Advance Requests** – Requests should **only** be sought for extraordinary circumstances and the individual traveler will adhere to the terms of the Promissory Note. Travelers are encouraged to request a VISA travel charge card, if level of travel so warrants.

<b>Travel Request Approvals</b> -	Traveler	must always sign the authorization form.
	Supervisor	must always sign the authorization form.
	Principal Investigator*	signs to certify cost of travel is allocable to the grant funded project (*if PI is different than supervisor).
	Agency Designee	<b>Department Chair</b> for routine and non-exception travel. <b>Dean/Director</b> for travel involving 4 or more employees non-exception foreign travel. <b>Provost</b> for foreign travel involving 4 or more employees via the Dean/Director's Office.

**Lodging Exception Request** - Explanation of circumstances justifying requests for lodging costs up to 200% of the per diem guidelines must be completed in this section of the Travel Authorization, Travel Advance and Lodging Exception Allowance Form and attached to the Travel Reimbursement Voucher. **\*Requires signature of VIMS Chief Financial & Administrative Officer.**

**Costs exceeding 200% of per diem exception** - Requests for lodging costs exceeding 200% of the per diem guidelines must show alternative cost comparisons including name and complete address and zip code of hotels (at least 3) used for cost comparison. The requests must be reviewed and approved by the **William and Mary Travel Accounts Manager before being sent to the Assistant Vice President of Financial Operations for consideration.** Once approved, the documentation must be attached to the Travel Authorization Form and to the Travel Reimbursement Voucher.

**NOTE:** - Travel exceeding 30 days requires an explanation of how daily operations regarding laboratory personnel and student supervision will be addressed in the absence of the traveler. **This must be attached to the Authorization Form.**

**When all approvals have been secured, the original form will be forwarded to the designated business manager who will then distribute copies appropriately.**

**Travel authorization forms must have all necessary approvals prior to travel taking place. The completed form serves as the employee's authorization to travel, to submit a subsequent reimbursement request and covers the employee while on travel for liability purposes.**