



Pre-Travel and Post-Travel Procedures

Purpose

This document describes Research Foundation (RF) policies and procedures to be administered before travel occurs (e.g., travel advances) and after travel occurs (e.g., documentation review).

Pre-Travel

Advances

Each operating location should establish its own policy on travel advances. To obtain an advance, the traveler should contact the operating location's office responsible for travel. Travel advances must be documented on the [Travel Payment Request Form](#) or an equivalent form developed by the operating location. This form is located in the Forms resource area of EPSS. Locations should not use SUNY travel forms.

Campus Responsibilities – The campus must have a process in place to track advances in order to (1) ensure that proper documentation is turned in upon the conclusion of the trip, and (2) ensure that funds are returned if the trip is cancelled. Travel advance policies should include but should not be limited to

- when an advance will be given,
- dollar levels, if any, for advances, *and*
- how the advance will be paid.

Pre-Travel Checklist

Travelers and operating locations may use the [Pre-Travel Checklist](#), provided as a tool for review of particulars prior to RF business travel. This checklist, found in the Forms resource area of EPSS, was developed to assist travelers with some important reminders and items to consider prior to traveling.

Post-Travel

Responsibility for post-travel procedures is assigned to the following RF personnel:

- RF travelers
- project or office director
- operations manager or designee

Specific responsibilities are discussed in the blocks below.

RF Traveler's Responsibilities After

Final Form

After the end of the trip, within a reasonable time as set by individual campus policy, the traveler

a Trip

should document the actual costs of the trip. The traveler should submit a final travel payment request form (the [Travel Payment Request Form](#), is found in the Forms resource area of EPSS) or an equivalent form developed by the operating location. SUNY travel forms should not be used.

The form must include the business purpose and the duration of the trip as well as the details of the actual expenses incurred. For further details about each type of expense, see the individual subject area within this Travel Guide.

Final Signature

The traveler's signature on the completed travel form is certification that the trip was taken for the indicated purposes, that the accounting is accurate and that allowances and reimbursements are calculated in accordance with this travel guide.

Final Receipts

The traveler must attach original receipts for all expenses claimed on the travel form, except for those items outlined in the Travel Guide for which receipts are not necessary. See individual sections of this guide for details on each type of expense. Justification and explanation, if required, must be attached to the form.

**Project/Office
Director's Post-Travel
Responsibilities**

The project director or office director must sign the traveler's completed travel payment request form in order to certify that the trip was taken for the express purpose of carrying out project objectives or RF business.

**Operations Manager's
Post-Travel
Responsibilities**

The operations manager or designee must sign the traveler's completed travel payment request form. This final signature is confirmation that

- travel is in compliance with all aspects of the RF Travel Guide and all sponsor regulations, *and*
- the travel payment request form and all associated documentation have been reviewed to ensure that the RF's travel policies have been followed.

The documentation review should include, but not be limited to, the items listed in the [Post-Travel Review Checklist](#). This checklist, found in the Forms resource area of EPSS, is a tool to assist in the review of travel payment requests.

Date	Change History
March 19, 2001	Updated links to forms and documents. Content of procedure NOT updated.

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