PRE-TRAVEL PROCEDURES

Individual Travel
Traveler:
- Submits written travel request estimate to department chair/head for approval. See Travel Authorization Form.
- Airfare may be purchased:
  o Directly through the University by submission of a Travel Agency Authorization Form to selected travel agencies, or
  o With a University Travel Card or personal credit card. Submit reimbursement request on an Expense Report.
  o Obtain Texas Hotel Occupancy Tax Exemption Certificate, if appropriate. Information on the potential exemption from the hotel tax of other states can be found on the Tax & Compliance Accounting website. See Other States Hotel Tax.

Department Chair/Head:
- Reviews written travel request estimate and notifies traveler of approval/disapproval.

Group Travel
Traveler:
- Submits written travel request estimate to department chair/head for approval. See Travel Authorization Form.
  - If an advance is needed for group travel, initiate a requisition that includes the following:
    o Names of all travelers and their Baylor affiliation
    o Purpose and justification for trip
    o Destination
    o Inclusive trip dates
    o Mode of transportation
    o Amount of advance requested based on a reasonable estimate of anticipated expenditures
    o Department name and number
- Business related cash needed for travel may be obtained through a requisition that includes the following:
  o Names of all travelers and their Baylor affiliation
  o Purpose and justification for trip
  o Destination
  o Inclusive trip dates
  o Department name and number
- If travel arrangements such as transportation or lodging are needed for group travel, initiate a voucher (if under $5,000) or requisition (if $5,000 or more) that includes the following:
  o Names of all travelers and their Baylor affiliation
  o Purpose and justification for trip
  o Destination
  o Inclusive trip dates
  o Department name and number
- For airfare, the voucher/requisition must be to an approved travel agency.
- Submits voucher(s) or requisition(s) to department chair/head for approval.
  - Obtain Texas Hotel Occupancy Tax Exemption Certificate, if appropriate. Information on the potential exemption from the hotel tax of other states can be found on the Tax & Compliance Accounting website. See Other States Hotel Tax.

Department Chair/Head:
- Reviews written travel request estimate and notifies traveler of approval/disapproval.
- Reviews requisition(s) for appropriateness, availability of funds, and compliance with Baylor Travel & Entertainment Policies & Procedures.
- Signs/dates requisition(s) when approving.
- Approves requisition(s) online or returns disapproved requisition(s) to traveler with explanation.
  NOTE: Requisitions do not electronically route to Procurement Services until edit checked, budget checked, and approved.

Budget Office:
- Provides secondary review and approval of requisitions for $25,000 or more.

Procurement Services Office:
- Reviews requisitions for policy compliance and then creates a purchase order.
• If applicable, submits purchase order to appropriate travel agency for authorization to release tickets.

**Accounts Payable Office:**
• Issues check for amount of approved travel expenditure.