

PRE-TRAVEL PROCEDURES

Individual Travel:

- Submit written travel request estimate to department chair/head for approval. See [Travel Authorization Form](#).
- Airfare may be purchased:
 - Directly through the University by submission of a [Travel Agency Authorization Form](#) to selected travel agencies, or
 - With a University Travel Card or personal credit card. Submit reimbursement request on an [Expense Report](#).
 - 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:

- Submit 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:
 - Names of all travelers and their Baylor affiliation
 - Purpose and justification for trip
 - Destination
 - Inclusive trip dates
 - Mode of transportation
 - Amount of advance requested based on a reasonable estimate of anticipated expenditures
 - Department name and number
- Business related cash needed for travel may be obtained through a requisition that includes the following:
 - Names of all travelers and their Baylor affiliation
 - Purpose and justification for trip
 - Destination
 - Inclusive trip dates
 - Department name and number
- If travel arrangements such as transportation or lodging are needed for group travel, initiate a voucher (if under \$10,000) or requisition (if \$10,000 or more) that includes the following:
 - Names of all travelers and their Baylor affiliation
 - Purpose and justification for trip
 - Destination
 - Inclusive trip dates
 - 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.

Procurement Services Office:

- Reviews requisitions for policy compliance and 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.