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.
- For Study Abroad Travel, submit finalized invoices and travel advance requests to CGEFinance@baylor.edu for processing.

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.