

The CBE requires that all employees traveling for UW business complete an approval request form. Special requests such as airfare or rental car upgrades should be identified in the trip details below.

Guidelines:

- ➔ This form should be approved by the Unit Manager/Supervisor, the Department Chair, or the College Dean.
- ➔ This form is required as support in the creation of a Spend Authorization in Workday. Spend Authorizations can be created by the traveler or submitted with a request form: <https://uwconnect.uw.edu/finance>.

Today's Date: _____

Traveler's Information:

Traveler Name: _____ Traveler Email/NetID: _____

Department/Unit: _____ Approving Manager: _____

I. **Will Personal Travel Time be Included:** YES NO

Personal Time Destination City: _____ Personal Time Destination State: _____

Personal Time Start Date: _____ Personal Time End Date: _____

Trip Details:

Destination City: _____ Destination State: _____

Travel Start Date: _____ Travel End Date: _____

II. **What is the business purpose for this travel?**
(please be as specific as possible and include supporting documentation with form submittal)

III. **How does this trip relate to your work assignments?**
(please be as specific as possible and include supporting documentation with form submittal)

Trip Expenses and Funding:

I. **Per Diem Allowed** (identify per diem limits for your trip: **US Rates** | **Foreign Rates**)

Breakfast	Lunch	Dinner	Lodging

II. What is the estimated total dollar amount to be spent:

Estimated Expenses: _____ (provide details below)

Registration:		Meals:	
Airfare / Transportation:		Ground Transportation:	
Lodging:		Other:	
Description of Other Costs:			

III. Please note any special requests:

IV. What is the source of funding for this travel?

- State Funds Federal Funds Gift Funds Research Funds Other Funds

Please note all related Worktags: _____

V. If the funding is split, please add additional information below:

- State Funds Federal Funds Gift Funds Research Funds Other Funds

Please note all related Worktags: _____

Approvals:

VI. Signatures:

The information provided is true and accurate for this decision and may be used for audit documentation:

Traveler Signature **Traveler Printed Name** **Date**

I approve this travel and the associated spend:

Approver Signature **Approver Printed Name** **Date**

*Once approved, travel arrangements can be made.
Speak with your Department Administrator for more information on how to arrange travel.*

Travel Recommended Practices and FAQ:

Visit UW's Travel Services Page for details on travel policy and guidelines that govern the University:
<https://finance.uw.edu/travel/>

Recommended Practice for Booking UW Business Travel:

**NOTE: Work with your Department/Unit Administrators to arrange and pay for airfare and hotel reservations on a Corporate Travel Account for visiting guests and students.*

Travel must be at the lowest logical cost and observe/exclude any fees due to personal preference, or convenience not necessary or critical to UW business.

It is not mandated how travel is booked. Travel may be booked through a travel agency, directly with the vendor, or through other booking channels. It is not recommended to book package deals through a fare aggregator such as Expedia, Travelocity, or Orbitz. Package deals may be taxed or not reimbursable due to non-compliance with receipt documentation. See [Package Deal Policy](#).

Airfare can be purchased with a personal credit card or a Department/Unit central travel account (CTA).

Lodging can be paid with a personal credit card or on the CTA **ONLY IF** there are five or more UW travelers attending a conference/group event and prior written approval has been obtained from Travel Services (uwcts@uw.edu).

Itemized receipts are required for reimbursement. This applies to all expenses.

Frequently Asked Questions (FAQs):

- **Do I need a receipt? What if I lost my receipt?**
 - You should make every attempt to retrieve a receipt from the supplier for the purchase. If a receipt cannot be collected, or if it has been misplaced, you must submit a Missing Receipt Declaration and/or supporting documentation such as a bank statement as proof of payment. Please note that for specific expenses such as Lodging, Airfare, Car Rentals or MPO a Missing Receipt Declaration is not allowed.
- **What if I reimbursed another person who paid for both of us; can I be reimbursed?**
 - NO. This is not reimbursable as it does not provide an appropriate audit trail. To ensure you can be reimbursed for your UW business expenses, pay your expenses separately from others or request receipts that clearly delineate between payees.
- **How do I request travel reimbursement if I paid for someone else?**
 - For UW Employees, input the total amount for all participants (including themselves) into the Lodging Per Diem item. If there is an overage, input the overage amount under the Daily Expenses in the Lodging Per Diem - Overage item and write into the memo field, "Claimant - # of travelers". Please enter the other travelers' names, purpose of trip, home address (city and state), and duty station (city and state) in the ER comment section.
 - Meals paid for others are separate from this and are reimbursed at actual costs as evidenced by receipts and cannot exceed the allowable meal per diem rate per person according to the location of travel.

- For Non-employees, in the Miscellaneous Payment module, the initiator will choose Claimant in the Payee field.
- **May I be reimbursed if I use Zelle, Venmo, or other peer-to-peer service to pay for UW expenses?**
 - NO. These types of applications do not provide a clear audit trail and are not currently accepted by the University.
- **May I be reimbursed if I make purchases using a rewards program (mileage points, credit card rewards program, gift cards, etc.)?**
 - NO. Expenses purchased using any rewards program, such as mileage points, credit card travel points, my wallet funds, gift cards or other personal rewards programs are not reimbursable.
- **Are travel upgrades reimbursable?**
 - The following travel upgrades or additional charges may be reimbursable:
 - Flight Change due to UW business needs: A flight change is not reimbursable if missed/changed/canceled flight expense due to negligent travel planning.
 - Seat Upgrades: Must be requested and approved in advance. Approval form must include justification and be attached to the expense report.
 - Class Upgrades: Must be requested and approved in advance. Approval form must include justification and be attached to the expense report.
 - For First Class upgrades, prior written approval and justification from a Vice President, Vice Provost, or Dean is REQUIRED and authority cannot be delegated.
 - For more detailed information visit the Approvals page of the Travel Services Website: <https://finance.uw.edu/travel/approvals#Airfareupgrades>
- **Per Diem no longer in Workday?**
 - Please note this is currently a Work-in-Progress. Travel Services is working with the FT Design Team to complete this procedure.
 - Most cities have been uploaded into Workday Financial. If you are not able to find it, you can use the "Per Diem - Legacy/Reduced" line item and manually calculate the per diem and input into the total amount field.
 - Please note the location and dates in the appropriate fields.
 - Documentation of the old per diem must be attached to the expense report as a PDF:
 - **Domestic (contiguous states)** can be found at: <https://www.gsa.gov/travel/plan-book/per-diem-rates>
 - **Foreign (including non-contiguous states)** can be found at: https://aoprals.state.gov/web920/per_diem.asp
 - Add a comment indicating this procedure was followed due to the per diems not being listed in the Workday system.
 - For any questions, please email the Travel Office: travel@uw.edu .