

FACULTY DEVELOPMENT GRANTS
TRAVEL AUTHORIZATIONS, TRAVEL ADVANCES & TRAVEL AND/OR NON-TRAVEL REIMBURSEMENTS

All expenditures of Faculty Development funds are subject to the “Foundation Funds Use Policy #202” of the UNCSA Policy Manual (<http://policy.uncsa.edu/2011/06/06/foundation-funds-use-policy-202/>). If you have any questions about the policy or the forms, please contact Kim Pauley, Academic Personnel Officer, Office of Academic Affairs (770.3261 or pauleyk@uncsa.edu).

USING YOUR FUNDS FOR TRAVEL

➤ **Travel Authorizations**

Travel authorizations must be completed at least 2 weeks prior to domestic travel and 3 weeks prior to international travel. The Travel Authorization form and instructions can be found on the UNCSA website at <http://www.uncsa.edu/formsprocedures/> under “Accounting Forms” (see “Travel Authorization Form Procedures” and “Travel Authorization Form – Employee”).

A few tips to remember when completing the form...

1. Leave the “6 Digit Fund #” field blank.
2. In the “Purpose” field, enter “Faculty Development Grant”
3. If you plan to request a travel advance, be sure to check “yes” in the “Advance Request” field and sign in the “Traveler” field. You will still need to submit a Foundation Request form to request the check (see below).
4. Complete the form in its entirety. If needed fields are left blank, it will slow down the processing of your request.

The form needs to be signed by you and your dean. Once signed, hold onto the form until you are ready to submit your travel advance request or your travel reimbursement. You’ll attach the signed travel authorization form to those documents.

➤ **Travel Advances**

Travel advances are requested by completing a Foundation Expense Report. This form is not yet online but can be requested from Kim Pauley. The maximum advance available is 75% of the award. Enter your expense information, total the expenses, calculate your advance, and leave the “Total Reimbursement” field blank.

After completing the Foundation Expense Report (including your dean’s signature), attach a copy of your travel authorization and your award letter and send it to Kim Pauley. Be sure to keep copies of everything for your records! You will receive a copy of the approved form via email from Kim. Allow at least 2 weeks for processing. Foundation will send the check to you through your department.

Advances must be reconciled on a Foundation Expense Report with original receipts attached upon

return from travel (see “Travel Reimbursement below”). Any advanced funds not spent must be returned to the Foundation immediately.

➤ **Travel Reimbursement**

Travel reimbursements must be filed within 15 days from return of travel.

Travel reimbursements are requested by completing a Foundation Expense Report. This includes airfare, parking/tolls, mileage, taxi/bus/train fares, rental cars, gas, hotel, meals, registration fees, and tips. This form is not yet online but can be requested from Kim Pauley.

When completing the form, enter your expense information, total the expenses, enter any advance amount, and calculate your total reimbursement. If your advance amount exceeds your reimbursement amount, attach a check payable to UNCSA Foundation. You do not need to enter expense information for expenses exceeding the amount of your grant.

After completing the form (including your dean’s signature), attach a copy of your travel authorization, your award letter and original receipts and send it to Kim Pauley.

PLEASE NOTE! Receipts smaller than 8 ½” x 11” must be taped to an 8 ½” x 11” piece of paper and attached to the Foundation Expense Report. More than one receipt may be taped to one piece of paper. Reimbursement packages that do not meet this requirement will be returned to you.

Be sure to keep copies of everything for your records! You will receive a copy of the approved form via email from Kim. Allow at least 2 weeks for processing. If due a reimbursement, Foundation will send the check to you through your department.

USING YOUR FUNDS FOR NON-TRAVEL EXPENSES

Reimbursement requests for non-travel expenses must be submitted within 15 days of incurring the expense. The Foundation Check Request form should be used for expenses not related to travel. The Foundation Check Request can be found at

<http://www.uncsa.edu/formsprocedures/foundation/FoundationExpenseReport.pdf>.

➤ **Completing the Foundation Check Request Form**

- **Payee:** The name of person who is requesting funds. If the project payment is for more than one person, each person will need to fill out a Reimbursement Request Form for his/her individual amount (i.e., a group of musicians performing or a group of faculty members attending a conference.)
- **Address, City, State, Country, ZIP:** The address of the payee.
- **Distribution, Project, Fund, Account, Dept, Budget:** Do not complete this area.
- **Total Check Amount:** Enter the amount requested.

- **Date Check Needed:** The date the check must be received by the payee.
- **Purpose of Disbursement:** Enter “Faculty Development Grant Award” and then a brief description of the project.
- **Note for Personal Services:** This applies only to payments to Independent Contractors.
- **Check Distribution:** Select the preferred option
- **Prepared By:** Your signature here.

After completing the form (including your dean’s signature), attach a copy of your award letter and original receipts for reimbursement and send it to Kim Pauley.

PLEASE NOTE! Receipts smaller than 8 ½” x 11” must be taped to an 8 ½” x 11” piece of paper and attached to the Foundation Expense Report. More than one receipt may be taped to one piece of paper. Reimbursement packages that do not meet this requirement will be returned to you.

Be sure to keep copies of everything for your records! You will receive a copy of the approved form via email from Kim. Allow at least 2 weeks for processing. Foundation will send the check to you through your department.