Guidelines for T&E Approval: Chairs and Business Managers

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Good internal controls dictate that there is an approval hierarchy in place to ensure that a subordinate does not approve a supervisor’s expense report.

It is expected that individuals traveling and entertaining on University business will exercise good judgment incurring T&E expenses and will spend University funds prudently within the University’s policies, procedures and guidelines.

The technical completion of all the reimbursements is performed in the business office or by an assistant. This includes proper PTAEQ, allowable/unallowable costs, limits, proper business purpose, attendees, conference brochure, all proper documentation, reasonable assurance of available funds, etc.

The specific process for T&E approvals is as follows:

**Business Managers**
- EMS report prepared in business office.
- Detail report signed by Chair and scanned into system.
- EMS report approved by Associate/Assistant Business Manager.
- Follow EMS process.

**Chairs**
- EMS report prepared in business office/Chair’s office.
- If Chair does not approve his/her own expense report on the e-mailed Certification Statement then the Chair must sign the Certification Statement and this signed statement must be faxed/scanned along with the supporting documentation.
- Reviewed by Business Administrator.
- Pass T&E expense reports >$200 to Jean Giovanelli for review. She will forward to Ken Hoyt for secondary approval.
- Follow EMS process.

**Note:**
- Office supplies, laboratory supplies, research supplies etc. should be purchased through a process that allows delegated approval with final approval if needed to be made by the Business Administrator.

**Please contact:** Ken Hoyt 785-4449 with any questions on these guidelines.