

DEPARTMENT OF THEATER

TRAVEL, RESEARCH & OUTSIDE ACTIVITIES PROCEDURES

RESEARCH & OUTSIDE ACTIVITIES

Below are the necessary steps required for all research and professional development activities.

- ◉ During the academic year, complete the **Prior Approval of an Outside Activity Form** and electronically submit to the Department Chair for approval six weeks prior to research activities and/or travel. An electronically signed decision will be returned to the faculty member in a timely manner.
- ◉ During the summer, follow the same steps for sponsored and university funded research activities and/or travel. We strongly encourage this same procedure for non-sponsored and university funded activities when an activity requires extended travel.
- ◉ Please review all live links and complete all check boxes prior to submitting for approval.
- ◉ If approved, an **Online Pre-Travel Form** must be sent to the Department Chair, at least one week prior to travel.

RESEARCH & OUTSIDE ACTIVITIES (CONT.)

- ◉ A university Citibank Travel Card is required for all university and department funded travel and business meals.
- ◉ If research and/or travel activities are supported through university or department funding, a reconciliation with receipts must be submitted to the Business Office within 72 hours from date of return. Any delay in reconciling travel paperwork could impact an individual's Citibank Travel Card status.

CORPORATE CARD

- Used for business travel and university-related meetings
- Do not use Procard for travel-related expenses
- Effective 7/1/18, all gratuities maximum is 15%
- If your Corporate Card is declined, contact Hillary Osgood at 413-545-1748 or hosgood@umass.edu. Do not use Procard.
- Pre-travel:
 - Online pre-travel registration must be submitted by the traveler and sent to the Department Chair for electronic approval a minimum of one week prior to travel. Registration form found at travelregistry.umasscs.net.
 - Pre-travel receipts due 48 hours from time of purchase
- Post-travel:
 - Receipts due 3 days from end of trip
 - Receipts include: boarding passes, meals, other travel-related purchases: ask Joanne for pre-printed travel envelope
 - Note: there will be no corporate card payment without receipt. Receipts are required for processing and payment to bank. Payments are due every 30 days. Late receipts = late payments and the University does not pay late fees.
- Out-of-Pocket Expenses:
 - Only when absolutely necessary (i.e.: vendor won't accept corporate card)
 - Note on receipt "out of pocket expense"

CORPORATE CARD (CONT.)

◉ Business Meetings

- One-on-One business meals are prohibited between 2 employees of the university. This rule applies to employees on travel as well. University business meals = 3+ employees
- If attendees include people from outside the university, at least 1 university employee is required at meeting.
- Along with itemized & charge receipts, provide Joanne with list of all attendees, their affiliation with university, titles, jobs, purpose of meeting.
- No alcohol policy – 15% gratuity maximum

◉ Corporate Card Reconciliation

- Joanne reconciles statements each month and creates expense report.
- Cardholder must verify report, sign it and return to Joanne within 24 hours of receipt for further signatures, approval and processing.