



Travel Checklist

This checklist is designed to aid travelers in completing proper documentation and forms for various types of travel. This form is not required for submission of expenses. Hyperlinks to the file are set up for underlined forms. The files are available on the Accounting and Financial Services website as well. All employees are required to apply for and use a Samford P-Card for business related travel and expenses. Mileage and rare exceptions will be handled through reimbursement process. Before any expense is placed on a p-card, a Travel Request Form must be submitted and approved.

STUDENT TRAVEL:

**** Student travel will be classified as either 'University Business' or 'Scholarship/Fellowship'. Please see the Student Travel Procedure 4.09.02 to determine which would apply. ****

Student Travel Form Travel Request Form

If classifies as University Business: Expense Report All Supporting Documentation

If classifies as Scholarship/Fellowship: Student Account Payment Request

P-CARD RELATED TRAVEL:

**** All travelers and approvers are held responsible for knowing the policy and procedures associated with procedure 4.09.01 - Travel, Entertainment and Business Expenses. ****

Travel Request Form All Supporting Documentation (**Upload to SpendClarity**)

Submit the completed and approved Travel Request Form after returning from event to invoices@samford.edu with a "\$" anywhere in the subject line.

REIMBURSEMENT RELATED TRAVEL:

**** All travelers and approvers are held responsible for knowing the policy and procedures associated with procedure 4.09.01 - Travel, Entertainment and Business Expenses. ****

Travel Request Form Expense Report (**Include all pages**)

All Supporting Documentation

Faculty/Staff are required under Samford University policy and procedures to be set up for direct deposit. If you are not set up, submit the below forms:

Direct Deposit Setup Form W9 Form (Domestic) W8 (International)

Voided Check or Copy of Banking Information (**** If you are unsure if you are set up, contact lesjones@samford.edu to confirm. ****)

Submit the completed and approved Travel Request Form with Expense Report and all supporting documentation to invoices@samford.edu with a "\$" anywhere in the subject line. If including direct deposit forms, submit these along with the rest of the reimbursement forms.