SAINT MARY'S UNIVERSITY SINCE 1802

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Name:	**Travel – Advance Requests**
Policy Number:	4-3001
Origin:	Financial Services
Approved:	1 October 1991
Issuing Authority:	Senior Director, Financial Services
Responsibility:	Manager, Procure to Pay Services
Effective Date	2019-OCT-21
Revision Date(s):	1993-MAR-01, 2007-SEP-01, 2011-JUN-01, 2019-OCT-21

Procedure:

Individuals may obtain advances from Financial Services for University related travel and must include their Banner ID ("A" Number) on the request.

Requests for an advance of funds are to be submitted on the Advance Request form. Include the 19 digit FOAP/account number to distribute funds to appropriate travel budget accounts. (Early payment of registration fees should be paid using PCard. If unavailable, a Payment Request form should be used).

Requests must be signed by claimant, authorized and received by Financial Services a minimum of ten (10) business days prior to departure.

Approvals:

Authorization – Required for each FOAP; submit when all accounts are authorized

Type of Account or FOAP	Authorization Required
Tri Council grants – NSERC, SSHRC, CIHR	2 Signatures – Grant Holder and Department Head*
Non Tri Council Grants	Grant holder
Operating Budgets	Department Head*

*If the individual requesting the advance is a Department Head or higher, the request must be approved by a level one up from the individual.

Required Advance Reporting:

At the conclusion of a trip a Reimbursement Form must be completed and submitted to

Financial Services that documents the Advance(s) received. The Reimbursement Form is required to be completed and submitted within 10 business days after return from the travel; if not the advance is considered to be delinquent. The University has the right to withhold future advances when an individual has a delinquent advance.

Forms:

Forms and supporting documents are available on SMUport.
(http://smu-web5.smu.ca/pages/financial-services/internal-forms.php).