Travel Report Instructions

The official SMU Travel Report is available on the Controller’s website:
http://www.smu.edu/BusinessFinance/Controller/FinancialAccounting/AccountingForms listed as “eTravel Report”.

Travel Authorization Section (top portion). Complete this section prior to travel.

- Include your name, ID, and information about your travel. The Fund/Organization code should be left blank.
- If using the SMU travel agency, Colwick Travel, you will need your Travel Subclass number before purchasing a ticket. If you do not know it, contact the CUL Budget Officer.
- In the “Select One Option” box, check how you want to be reimbursed.
- If you request a travel advance, complete the Advance Request section. This should be submitted 2 – 3 weeks in advance, but no more than 30 days prior to travel. SMU allows up to $75 per day for advances.
- Sign and date in the “Requestor” box.
- Turn in both the Travel Report and the Request for Professional Leave form to the CUL HR office prior to your travel, preferably at least 3 weeks in advance. The Professional Leave form must be signed by your supervisor and Assistant Dean.

Expense Report Section (middle portion):

- Report actual expenses for lodging and meals under the columns for each day (rather than a per diem amount) and then total in the far right column (the electronic form will total for you).
- Do not include conference registration if it has been pre-paid by CUL (having the registration paid by Meg Ruckman is preferred since you will not be out the money in advance)
- Include the total airfare price under the first day of travel and then total in the far right column (whether paid personally or by the SMU travel agency).
- Section 13 (Prepaid Expenses for Traveler) is ONLY used for cash advances or airfare purchased through the SMU travel agency. This amount is subtracted from the total conference expenses.
- The final total for line 15 (Amount Due Traveler) will be adjusted by the Assistant Dean for Human Resources after reviewing expenses per CUL policy.
- Sign and date under the “Requestor’s Signature” box at the bottom of the Expense Report section before submitting the completed form and your receipts.
- If you enter expenses into the online form and you sign that copy, attach the original signed copy that was first submitted and approved by the Assistant Dean.
- All receipts must be taped (on all sides) to an 8.5” X 11” sheet of paper with any notes on the side. Multiple receipts can be taped to a page, but do not tape over receipt numbers. Receipts must only be on one side of the paper.

Professional Conference/Workshop Report:

Submit this report with the Travel Report. The form is on the CUL Staff Resources section under Travel. You can enter information into the form directly. Please be thorough enough to sufficiently address what you learned at the conference/workshop and what you might hope to bring back from the conference. Generally, a page or so will be adequate.