Allowable Travel Payments to Faculty Members on Leave
FIN-ACC-610

About This Policy

Effective Dates:
09-20-2010

Last Updated:
07-01-2011

Responsible University Administrator:
Vice President and Chief Financial Officer

Policy Contact:
Joan Hagen
Associate Vice President
and University Controller,
Office of the Controller
jhagen@iu.edu

Scope

All University units and external agency funds.

Policy Statement

University funds may be used to pay certain travel expenses for faculty members on leaves who are involved in work that benefits Indiana University. Leaves for purposes of this policy include leaves without pay, sabbaticals, and summer periods when the faculty member is not on appointment.

To be eligible for reimbursement of travel expenses faculty members must be able to demonstrate that the activity cannot be accomplished from the home base of the faculty member. All expenses must be reasonable in amount and commensurate with the duration of the stay.

Allowable travel expenses include:

- Round-trip airfare
- Hotel or rental of other less expensive accommodations
- Per diem
- Transportation to and from airports
- Rental car

If the travel period exceeds 8 weeks, then University funds cannot be used for these expenses without the prior written approval of the unit leader.

Reasonableness in amount of total expense should be considered during the approval process. Requested amounts that seem excessive should result in negotiations between the faculty member and the school to determine an amount that is reasonable for the school to spend on the reimbursement. Excessive might be in relation to the standard travel allowances. The unit should look at the total amount of the reimbursement to determine if it is excessive in total per comparison to other like expenses in the unit.
Reason For Policy

Guidance for academic leaves has been historically provided in the University Academic Handbook only. Correlating a University financial policy with the handbook allows for greater adherence to policy since most staff does not regularly refer to the handbook. In addition, the University Academic Handbook did not provide clarity on definitions or process, which is needed by staff as they process reimbursements.

Procedure

To be eligible for payment of travel expenses when the travel period exceeds 8 weeks, faculty members must submit a written request to the Dean estimating proposed expenses to be covered by Indiana University. Written approval from the Dean is required and must occur prior to the commencement of the trip. If the faculty member has been the recipient of a grant or other funding that is providing support for expenditures during a leave that exceeds 8 weeks, this information must be disclosed to the Dean with the written request.

The Fiscal Officer must retain a copy of all documentation related to the approval for seven years. Documentation includes the original request from the faculty member, the formal written approval of the Dean and any documentation showing calculations and analysis used to determine approved amounts. Adherence to all applicable university policies for reimbursement of travel and other expenses must be followed.

Definitions

Unit Leaders: For the purposes of this policy are as follows:

- For University Administration, IUPUI and Bloomington campus the unit leaders of the academic department are the Deans.
- For the regional campuses the unit leaders are the Vice Chancellors for Academic Affairs.

Sanctions

Requests for reimbursement of expenses while on leave without pay will not be allowed if written approval from the Dean did not occur prior to the leave.

Additional Contacts

Campus Administration, Financial Management Services

History

Guidance for leaves has historically only been provided in the University Academic Handbook. As of 2014, the University Academic Handbook has been moved to the University Policies website under the Academic, Faculty, Students category.

Related Information

Travel Management Services Guidelines
Vacations for Academic Appointees
Leaves for Academic Appointees
Separations for Academic Appointees