

To: Travel Preparers
 From: Robert A. Liebowitz, Controller
 Date: December 2, 2013
 Subject: Pre-Travel Authorization

All University domestic and foreign travel requires pre-approval by the supervisor and the appropriate funding authority. Documentation of pre-travel approval is made via the pre-travel authorization (PTA) form, similar authorization or printed email containing the same information. Evidence of pre-travel authorization for overnight and out of state travel is required with expense report submissions. Department heads and supervisors can issue blanket or multi-trip authorizations to staff for operational expediency.

The Pre-Travel Authorizations have several purposes.

1. Certifying the business purpose of the travel and coverage of duties while absent.
2. Approving the travel funding, regardless of source (If the supervisor is not the fund manager some areas may require additional signatory approval by the fund manager.)
3. Qualifying the traveler for out-of-country insurance or other relevant benefits
4. Demonstrating that the traveler understands and agrees to comply with all relevant travel policies

The requirements for completing a Pre-Travel Authorization form have changed as shown below:

	OLD	NEW
Domestic Travel	Pre-Travel Authorization Required For:	Pre-Travel Authorization Required For:
	Travel Expenses Greater Than \$300	Out of state travel
	Overnight Travel	Overnight travel
	Approval Signatures Required:	Approval Signatures Required:
	Supervisor	Supervisor
		Fund Manager (if required by area)
Foreign Travel	Pre-Travel Authorization <u>Form</u> Required For:	Pre-Travel Authorization <u>Form</u> Required For:
	All Travel	All Travel
	Approval Signatures Required:	Approval Signatures Required:
	Supervisor	Supervisor
		Fund Manager (if required by area)
	Vice Chancellor or Provost	N/A

Individual department, MBU or executive area policies may be stricter than the campus policies noted here. The revised PTA form is available on the Controller's webpage at www.umass.edu/controller/sites/default/files/travelauth.pdf. Questions concerning the PTA form should be directed to the Controller's office at 5-0806.