

Sponsored Award Travel Learning Guide

Updated for Emburse Enterprise (formerly Chrome River)

This guide helps Principal Investigators and their key personnel understand how to plan, authorize, conduct, and document sponsored award travel in compliance with Western Carolina University and State of North Carolina travel requirements.

1. Regulatory Framework

1.1 Governing Rules

WCU travel procedures follow state-mandated travel regulations that control authorization, reimbursement, and documentation of official state business travel.

1.2 Applicability

Policies apply to all individuals traveling on official University business, including sponsored project activities, required trainings, and travel that directly advances University or sponsor objectives.

2. Roles & Responsibilities

2.1 Traveler Responsibilities

Travelers must:

- Use prudent judgment when incurring costs
- Avoid unnecessary, luxury, or personal-preference expenses
- Pay for any unauthorized or personal charges themselves
- Submit for timely reimbursement of travel expenses (within 30 days of the travel occurring)
- Ensure all required documentation and items for reimbursement have been attached to the travel reimbursement record

2.2 PI / Supervisor Responsibilities

Principal Investigators must:

- Ensure travel is necessary, reasonable, and allowable
- Confirm funds are available in the sponsored project
- Submit, Review, and/or Approve travel requests and reimbursements for themselves and key staff in a timely manner
- Ensure travelers submit all required documentation and items for reimbursement

2.3 Sponsored Award Requirements

Post Award must ensure:

- Travel is permitted by sponsor rules
 - Expenses align with project budgets
 - All travel is fully documented through Emburse Enterprise
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3. Required Pre-Travel Steps

3.1 Emburse Enterprise Pre-Approval

All travel must be pre-approved in Emburse Enterprise before any bookings occur. Pre-approvals must include anticipated costs and business justification.

3.2 Required Approvals

A pre-approval must be authorized by:

- The traveler's supervisor
- The budget authority (PI for sponsored projects)
- Any sponsor-required approvers, if applicable

3.3 Pre-Payment of Airfare and Registration

Airfare and conference registration may be reimbursed before travel if:

- A pre-approval is fully approved
 - Itemized receipts and proof of payment are uploaded in Emburse Enterprise
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4. Booking & Paying for Travel

4.1 Traveler Responsibilities

Travelers are responsible for:

- Ensuring charges are allowable
- Avoiding personal or unauthorized purchases
- Reimbursing the University for any misuse

Note: Third-party lodging platforms (e.g., Airbnb) require pre-approval and justification.

4.2 Permitted & Reasonable Travel Expenses

- **Meals:** Per diem applies when in travel status; amounts vary by location.
- **Lodging:** Must be necessary and reasonable; exceptions require justification.
- **Transportation:** The most cost-effective method must be chosen; unnecessary routing or convenience-based upgrades are not allowed.

4.3 Vehicle Use & Ride Sharing

To reduce costs, the University encourages:

- Minimizing the number of vehicles used
- Sharing vehicles when possible
 - Only the vehicle owner/driver may claim mileage reimbursement.

5. During Travel

5.1 Documentation Travelers Must Retain

Travelers must save:

- Itemized receipts for all expenses except per diem meals
- Proof of payment
- Lodging receipts showing dates and charges
- Conference agendas/registrations if relevant for justification (required for sponsored projects)

5.2 Conduct During Travel

Travelers must remain on official business and avoid personal activities that would invalidate travel status or reimbursement eligibility.

6. After Travel

6.1 Emburse Enterprise Expense Reporting

Expense reports must include:

- Travel dates and times
- Lodging details
- All relevant receipts
- Correct per-diem claims

Travelers must submit reports within **30 days** of the end of the travel period.

6.2 Sponsored Award Cost Compliance

PIs must confirm:

- Expenses are charged to correct project funds
 - Reimbursements fall within the award's active dates
 - Costs are reasonable, necessary, and consistent with award terms and University policy
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7. Special Travel Types

7.1 Out-of-State Travel

Considered official business when approved; travel status begins upon leaving North Carolina.

7.2 Out-of-Country Travel

Requires approval from the appropriate University authority (e.g., agency head or designee). Status begins when leaving the United States.

7.3 Student & Non-Employee Travel

Students and non-employees do not have access to Emburse Enterprise. Departments must submit travel documentation and reimbursement requests on their behalf using University-approved processes.

8. PI Sponsored Travel Compliance Checklist

Before Travel

- Confirm sponsor allowability
- Verify budget availability
- Approve Emburse Enterprise pre-approval
- Upload justification and supporting materials

During Travel

- Collect receipts
- Follow lodging and per-diem rules
- Avoid personal or unallowable expenses

After Travel

- Review and approve expense reports
 - Ensure submission within required timelines
 - Confirm accurate cost allocation
 - Retain documentation for audit purposes
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9. Support at WCU

- [Travel Procedures Manual](#)
- Emburse Enterprise instructions and job aids
- Travel Office support for questions and troubleshooting
- Office of Research Administration's Post Award Team

