

ISU TRAVEL IMPROVEMENTS

ACCOUNT DIRECTOR GUIDELINES

Overview

As an account director, you are responsible for reviewing and approving the activity in your index. By approving a traveler's pre-approval and expense report, you certify that all submissions are true and accurate to the best of your knowledge, linked to a legitimate business purpose, and comply with ISU travel policy.

General Expectations

- Familiarize yourself with the [ISU Travel Policy](#)
- Review [travel procedures](#)
- Travel documents are approved via ISU email or the Chrome River Dashboard
 - To review how to approve travel documents in more detail, please refer to the following [web trainings](#)
 - Approve Travel Documents via Email
 - Approve Travel Documents via Chrome River Dashboard

Detailed Expectations for Reviewing and Approving Travel Documents

Pre-Approval

- Is the traveler following University Travel Policy?
- Is there a clear official university business purpose for this trip?
- Are there any unusual items that need explained?
- Has the traveler selected the least expensive and most practical mode of transportation?
 - If a rental car is selected, is there an appropriate justification note?
 - If mileage is selected, is this the least expensive and practical option, or is there an appropriate justification note for the applicable coach airfare rate instead?
 - If airfare is selected, is this the lowest priced coach fare?
- Is there budget or funds available in the index selected for charge?

Expense Report

- Is the departure/destination consistent with travel plans and claimed expenses?
- Are the expenses reasonable and necessary?
 - Example: does the trip require a rental car, or is another mode of transportation more economical? (taxi, shuttle, rideshare)
- Are personal expenses identified separately from university expenses?
- Review the compliance warnings in Chrome River to ensure the traveler's explanation are sufficient
- If a traveler has any unusual expenses, chosen a method other than the least expensive and most practical mode of transportation, or deviates from university policy, a justification note and/ or supporting documentation must be provided or attached to the travel document. Auditors and the Travel Office, in their review, will utilize this information.