Title: Non-Employee Travel

Purpose: This SOP describes the appropriate steps for processing non-employee travel.

Applicable to: All non-employees and guests of KIC

Email the traveler the necessary forms such as the Disbursement Voucher Payee Certificate, W8BEN or W9, and request all needed information that is mentioned below

**DV Request**

Ask that the traveler *only* sign and date the Disbursement Voucher Payee Certificate. The department will complete the dollar amount and other blanks on the form.

1. Add the traveler as a DV vendor within the IU system once the completed forms are received from the traveler.
2. Once the traveler is approved as a DV vendor, email the Dept of Med Financial Services and request a DV number for the upcoming travel. The request should include the following:
   a. the traveler's full name, dates of travel and the account number
   b. a copy of the email from Division Administrator stating that the travel is approved on the selected account(s) and date(s)
3. Once the DV number is provided proceed with all further travel arrangements.

**Airfare and Ground Transportation**

When booking the airfare it is most helpful if the traveler provides pre-selected flights or preferred departure and arrival times.

4. To book the airfare contact IU Travel Authority at 317.274.2738 - Provide the rep with your name and campus location, state that you need to book non-employee travel airfare. The following is needed:
   a. DV and account number, full name as it appears on driver’s license or passport, date of birth, passport number for international flights, seating preference and frequent flyer information
5. IU Travel Authority will send the itinerary via email once the request is processed, review the itinerary immediately for accuracy and forward to the traveler. If there are any changes or corrections that need to be made advise IU Travel Authority as soon as possible.
6. For mileage the traveler will need to complete the Travel Mileage Record.
Hotel
All guest hotel reservations must be located close to campus or the downtown area for the stay to be considered an IU business expense. The list of hotels and the contact information for reservations can be found at [http://www.indiana.edu/~travel/hotel/hotelrates.shtml](http://www.indiana.edu/~travel/hotel/hotelrates.shtml).

7. The Omni Downtown is the IU Preferred Hotel - Joe Duncan jduncan@omnihotels.com 317.396.3647 is the direct bill reservation representative. The following is needed:
   a. DV and account number, dates of stay, room preference, and full name of all guest
   b. The room reservation is for room fees and tax only – be sure to note this when making the reservation. All incidentals such as room service, parking, etc. must be paid for by the traveler and the receipt submitted for reimbursement.

DV Submission
8. Once the trip is completed and the Disbursement Voucher Payee Certificate, receipts, mileage log, etc. have all been received, scan all receipts and send them as a PDF to Dept of Med Financial Services with an email stating the DV number, account number (in case of any changes) and request processing. Retain all hard copy original receipts as required for audit purposes.
9. Once all required documentation has been sent for reimbursement, email the traveler and state that the reimbursement will be sent soon and if any further information is needed from them that someone from the department will be in contact.

The traveler is always welcome to stay with friends or family during their visit. If they do this please complete the Exception To Policy form. Note the dates, the name, address and telephone number of who the traveler stayed with a brief summary of why a hotel was not needed. If the traveler carpooled that should also be noted under the Policy Exception Requested section of the form.

Example:
*Policy Exception Requested: traveler stayed with a relative while in town to attend meetings on IUPUI campus with Dr. (last name).* 
*Justification: John Doe, 1330 Hollywood Street, City, State, Zip and phone with area code.*

Resources

IU Travel Management: [http://www.iu.edu/~travel/](http://www.iu.edu/~travel/)