Faculty Paperwork Requirements

The most important thing is to get approval for any travel, camps, visitors, guest artists, purchases, etc. well in advance of the actual event. Every situation is different and if there is time to do research people will get reimbursed/paid timely.

Travel

The following items need to be submitted for travel if applicable:

- Itinerary* with departure and arrival back in Boise times noted. Also, any personal travel* that is taken while you are on university business. This can be as simple as an email to me if you do not have a formal itinerary. Per Diem for meals and incidentals is figured from this.
- **Itemized** meal receipt if you are not claiming per diem, this is the items ordered along with the payment receipt; alcohol is not reimbursed by the University
- Flight quotes (web is fine) from 3 vendors*/payment confirmation (obviously after it occurs)
- Hotel estimate*; then reservation, itemized check out receipt & payment confirmation
- Any ground transportation (train, rental car) receipts
- Conference fees*/workshop fees*/convention fees proof of payment

If you have an "up to" amount approval, you need only forward receipts up to the specified amount. In general, it never hurts to forward receipts related to your business travel, even if the university cannot cover it you may be able to deduct non-reimbursed business travel expenses on your taxes.

It is recommended that each person keeps an electronic file of their own.

Travel Timeline:

- Music Department Travel Request (Faculty Professional Absence/Travel Request) – **as soon as you are considering travel**
  https://docs.google.com/a/boisestate.edu/forms/d/e/1FAIpQLScEIy91GZEBizgZbed1rIV17Oc7Apbmj4j7mueqtZH6n4e-w/viewform
- Admins cannot submit without the above * items
- At this point **no-cost travel** goes through the same process
- At this point **student travel** goes through the same process with the inclusion of
  - Student Roster including BSU ID# for those traveling
  - Student Travel and Field Trip Expectations Consent Agreement for each student
- **Submission & Approval may take up to 2 weeks**
- Purchases cannot be assumed reimbursable until the approval process is complete
Travel

- Within a week of return: notify the admin that you have returned, submit the above back up
- An Expense Report is submitted for reimbursement items
- A request is made to close out the Travel Authorization

Field Trips

- Non-travel field trips also require a Student Travel and Field Trip Expectations and Consent Agreement for each student
- If a student wants to take personal time or meet with family or friends while on a field trip they need to sign a Trip Deviation form and give it to the trip coordinator

Expense Reports

All faculty should add the Financial Technician (Shelli Ficks), Jennie Ficks, and Jennifer Myers as a delegate in OFC so that they can enter their expense reports on the faculty’s behalf. Here are instructions: https://vpfa.boisestate.edu/process/UFS-training/OFC/Managing-Delegates-in-OFC-Expenses_JOBAID.pdf

The new system is enabled so that faculty can submit their own expense reports and upload the necessary documentation themselves, but keep in mind that the fund source manager is required to reject any ER that doesn’t include all the necessary documentation. Should any faculty be interested in learning how to submit their own docs (and it is easy once you get the hang of it and everything collected first), Shelli or Jen will be happy to meet with you and show you how.

Refreshments/Meals Provided for Meetings

An agenda/itinerary and list of participants (including their affiliation with the university) are required in addition to the receipts. These items plus an EES (Event Expense Summary) form need to be attached to the expense report.

Guest Artists/Performer/Instructors

If your artist/performer/Instructor has not received monetary funds from Boise State in the past year they must be set up with new or updated vendor status. THIS CAN TAKE UP TO 6 WEEKS, and must be done before any request for payment or reimbursement. The following must be submitted to begin this process:

- VIF (university form https://vpfa.boisestate.edu/process/uformsdocs/purvend.pdf)
  OR Federal W-9
• BSU ID# if at any time they have been paid as an employee or attended BSU as a student
• BSU Vendor ID# if they have previously been paid by BSU as a Vendor
• Scope of work for the planned event including type of activity, date(s) it is planned for, estimated amount of payment

After the submission and approval of the vendor items, admins will let you know that this artist/performer/instructor is ready to be contracted with.

At this point, there are a few different types of agreements:

• Up to $599: Guest Honorarium is most likely. In addition to the $599 honorarium, travel expenses can be reimbursed, as long as the appropriate receipts are included. After all the required back up documentation is gathered and the guest has performed his/her agreed upon duties, it generally takes up to 2 weeks for payment to be submitted, approved, and processed.
• $600-$1999: This person may either be deemed an Independent Contractor (IC) or a Boise State University employee
  o If deemed an IC, a new contract/LEA must be drawn up, approved, signed by both the IC and the University before work can be commenced. If the contract is not a standard Boise State form, or if changes are made to the standard form, there are additional university approvals that have taken up to 6 months in the recent year. Please be aware that this is a possibility, and provide the admin with as much documentation in as timely a manner as possible. University policy states that a contract must be in place before the work is performed.
  o If deemed an employee, all the normal employee paperwork must be filled out, including a current Federal I-9. Please be aware some of this paperwork must be done at HR on campus, or remotely with the signature of a notary.
• $2000- up: This person may either be deemed an Independent Contractor (IC) or a Boise State University employee
  o If deemed an IC, a new contract/LEA must be drawn up, approved, signed by both the IC and the University before work can be commenced. If the contract is not a standard Boise State form, or if changes are made to the standard form, there are additional university approvals that have taken up to 6 months in the recent year. Please be aware that this is a possibility, and provide the admin with as much documentation in as timely a manner as possible. There is an added layer of approvals because of the amount. University policy states that a contract must be in place before the work is performed.
  o If deemed an employee, all the normal employee paperwork must be filled out, including a current Federal I-9. Please be aware some of this paperwork must be done at HR on campus, or remotely with the signature of a notary.