

Process for Leave and Expenditures Requiring Approval by the Office of Academic Affairs

The Office of Academic Affairs requires approval for all deans' and OAA unit heads' travel, leaves, expenditures, exceptions or pre-approval requests, including the following expenditure transactions: personal memberships, subscriptions, business meals, alcohol, cell phones, etc. Colleges and OAA units should review transactions for appropriate funding sources prior to forwarding to the Office of Academic Affairs for approval.

Guidelines

The Office of Academic Affairs will review transactions for business purpose and appropriateness. In addition, consideration will be given to the potential impact of the transactions when viewed by the taxpaying public.

General

- The business purpose for all transactions should be written clearly, so that an individual who is unfamiliar with the university's operations can understand why the transaction occurred and how it benefits the university's mission. Avoid acronyms.
- Conferences, subscriptions and membership expense requests should clearly explain how the purchase relates to the dean's or unit head's position within the university.
- If there are ambiguous circumstances regarding a specific transaction, consult with OAA prior to purchase.
- Correspondence regarding any request can be emailed to ADMIN-OAA.Approval@osu.edu.

Meals

- All meal attendees and their affiliation to the university must be listed.
- Alcohol expenses only up to \$20 per person will be approved and must have an appropriate business purpose and funding.
- OAA approval is required when deans/unit heads host or attend a meal/an event paid for by their college/unit.
- Meals with other university personnel should rarely happen and only if the meal time is the only time available for all parties to meet. These meals must be charged to discretionary funds.

Spouses/Guests

- Spouses/guests meal and entertainment expenses should only be charged to university funds if there is a bona fide university purpose for their attendance. The requirement for their participation should be clearly indicated. These expenses should happen infrequently.

Cell Phone

- Personal cell phone bills must be submitted annually for review of allowance to ensure amount provided is appropriate. Allowance provided should be reasonable compared with actual business use.

Approval Submission Process:

- **Expenditure** approval requests should be submitted through the eRequest system ad-hoc function. Please use the "Search for Ad-Hoc Approvers" button and submit the request to Rachel Cornell.
- **Leave** approval requests should be submitted through the eLeave system for vacation and sick leave. Business leave approval is received via the Travel system and therefore does not require submission of an eLeave request.
- **Travel** approval requests should be submitted through the eTravel system ad-hoc function. Please use the "Search for Ad-Hoc Approvers" button and submit the request to Rachel Cornell.
 - Travel Requests with prepaid expenses (airfare, conference registration) must be sent by 3:00 p.m. if a same-day system approval is required