

## Procedures and forms on business trips

The **approval of business and study trips** is performed directly by the **offices** in the departments and faculties. The **settlement of travel costs** is performed by **Unit II.7 Travel and Relocation Expenses** (Giselastraße 10) of the university administration.

The advantage of this is that the respective offices can better assess whether a trip is necessary. The same applies to the distinction between a business trip and a study trip. Additionally, trips are approved at the place where responsibility for budgets lies.

All business and study trips must be approved prior to commencement.

Responsibility lies with the supervisors and the offices within the departments.

For professors, approval by the office is sufficient. The supervisor's signature is only required if courses are canceled, postponed, or taken by another member of teaching staff.

Within the university administration, approval by the supervisor is sufficient.

To obtain approval, please use the application for travel approval (F70a; English version) at [https://www.serviceportal.verwaltung.uni-muenchen.de/services/\\_formularcenter/\\_personal/070-a-reisegenehmigung-en.pdf](https://www.serviceportal.verwaltung.uni-muenchen.de/services/_formularcenter/_personal/070-a-reisegenehmigung-en.pdf).

Retrospective approvals may only be granted in justified exceptional cases to enable the reimbursement of costs. However, in this case statutory insurance cover no longer applies. Business travelers can request a reasonable advance in respect of the anticipated travel expense allowance. Advances are managed in detail by the budget-controlling offices in accordance with any special considerations for the respective subject area or field.

Below we define the most important concepts and provide information about the circumstances under which business and study trips can be approved.

### Business trips

Business trips are trips for the purpose of performing official business away from the place of employment that have been prescribed or approved in writing.

Employees who are required to perform official business of a specific recurring type at the same place of business, e.g. mail runs, may be issued with a written permanent travel approval. This provides statutory insurance cover for the corresponding business trips.

You can find a sample (in German) at [https://www.serviceportal.verwaltung.uni-muenchen.de/services/personal/\\_formulare/nicht\\_in\\_liste/dauerreisegenehmigung-muster.doc](https://www.serviceportal.verwaltung.uni-muenchen.de/services/personal/_formulare/nicht_in_liste/dauerreisegenehmigung-muster.doc).

The distinction between business and study trips is an important one.

This decision will be taken by your supervisor when approving the business trip request. Some indicators are listed below:

- Trips to conferences and congresses are deemed study trips if the event is attended for professional reasons, but not for the purpose of performing any assigned professional duties.
- Events in which employees actively participate (talk, poster, project discussion, chairing etc.) may be deemed business trips.
- Attendance at academic congresses and conferences without active participation may be deemed business trips if their purpose is academic discussion within the research area of the attendee/traveler and thus serve to exercise the individual's research role.

### Study trips

Study trips are trips that employees undertake after completing their formal education for the purposes of further professional development.

Study trips may also serve to expand employees' professional knowledge, abilities, and experiences, to adapt to altered professional requirements or to prepare them to deal with new or different tasks.

They are not directly for the purpose of performing the official business tasks assigned to them.

**Only a limited reimbursement** of the costs of study trips is possible.

### Settlement travel costs

Once your application for a business or study trip has been approved, you are entitled to a full or partial reimbursement of the costs incurred. In order to calculate these expenses, within six months of the end of the trip Unit II.7 requires your application for reimbursement of travel expenses using form F71a (English version), which can be found at

[https://www.serviceportal.verwaltung.uni-muenchen.de/services/\\_formularcenter/\\_personal/071-a-reisekostenerstattung-en.pdf](https://www.serviceportal.verwaltung.uni-muenchen.de/services/_formularcenter/_personal/071-a-reisekostenerstattung-en.pdf).

The original receipts and the application for the business trip approved before the start of the trip (see above) must be enclosed with the application. Please note that this is a statutory limitation period, i.e. if your application is not received by Unit II.7 in good time, the entitlement to reimbursement lapses.

The reimbursement of travel expenses may cover various types of reimbursement. This includes for example reimbursement of travel costs, daily allowance, accommodation allowance, reimbursement of expenses in the event of a longer stay at the place of business or overseas business trips. Further information can be found on the reverse of the business trip application.