CHECKLIST FOR SPEAKER/TRAINER PRE-APPROVAL
Reference Only – For PI’s and Form Preparers

☐ Signed Original “Request For Payment to Trainer” Form
  Signed by P.I. and Jim Steele

☐ Letter of Invitation to the speaker from the PI or Department Head

☐ Curricula Vita

CHECKLIST FOR FINAL PAYMENT TO TRAINER/SPEAKER
For PO Preparer

☐ Original "Request For Payment to Trainer" Form
  Signed by PI and Jim Steele

☐ Letter of invitation to the speaker from the PI or Department Head

☐ Curricula Vita

☐ Purchase Order - include Description/Amount

☐ Signed Letter (Non-electronic) or Invoice from Trainer (confirms completion)

☐ Letter or Invoice needs to be signed “Received”

☐ Agenda (verifies training)

☐ Attendee roster (verifies training)

☐ If travel is being reimbursed separately, note on bottom of check request:
  "Travel reimbursed on TRV#________ " (if known); or
  "Travel expenses not yet received"

☐ If travel is payed by CTS, provide CTS form & Passenger Receipt