

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 paid by CTS, provide CTS form & Passenger Receipt