First things first....

This guide was written with the busy student in mind. It is my hope that the guide makes it a little easier to navigate the travel process and ensure that you take the steps necessary to receiving a trouble free reimbursement.

What’s covered?
This guide begins by laying out some things to consider before you leave on your trip. There are a lot of reasons why a claim or expense will be denied and my goal is to get you thinking about potential pitfalls to avoid before they become problems.

Let’s be honest!
As a busy student you don’t have time to read all the rules for receiving a travel reimbursement. Your focus is on your presentation and school work not the million and one rules and exceptions to the rule. With this quick guide you should be able to cover the basics in a short amount of time.

Good to Know
Lastly, I have included links to the various travel guides (just in case you need it) that have served as the main sources for the information I have provided, and other helpful links to tutorials and forms.

These links are there to provide information but if you have a specific question please do not hesitate to contact our department office for help.

The more things change...
With any large institution you have an even larger bureaucratic machine helping to keep it running. But that also means that the rules guiding reimbursement can change from one day to the next. If there’s a question or doubt about any part of your travel please do not hesitate to ask for help.

There is a lot of things we can do before your trip to ensure full reimbursement. However, if you wait until after your trip to discover you’ve broken a rule.

Travel Authorization: What to keep in mind.
With a some advanced planning you can save yourself a headache later. Page 2

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Best practices and things to remember while you travel. Page 3

Traveling Scenarios
This section will go over common scenarios students encounter that can be a potential pitfall during the reimbursement process. Page 4

Important SJSU travel links
Looking for tutorials or specific detailed information on travel guidelines. Find links to these items and a few more. Page 5

Travel Funds At A Glance
Get a quick overview of the most common requests/action items for all three financial entities on campus. Page 6
First things first...

Authorization to travel

When applying for the student travel fund you also need to fill out the travel authorization. Here are some things to keep in mind and tips to help you.

- Have estimates for travel expenses ready. Be as realistic about your costs as you can be, try to estimate enough to cover expenses up to your funded amount, which at this time is limited to $500.00.
- What are travel expenses? This would include: lodging, meals, transportation, registration and some business expenses i.e. faxing, Internet access, business center usage.
- Make sure you remember to sign the form. Turn it in with the entire travel award application.
- Once it is approved you will receive an email from the Psychology Department letting you know if you have been awarded funds. If you don’t hear back within a week send a reminder email or give us a call.

- Shortly after the department email you should then be on the look out for an email from Research Foundation giving you their authorization number and approval. Keep that handy, you will need to provide it when you turn in your receipts.
- REMINDER: International travel requires at least 30 days in advance (must reach the President’s office at least 30 days in advance) but 45 is recommended for countries not deemed high hazard. 45 days is required for those countries that are considered high hazard.

Are you going to .....?

It will help you later to start asking a few questions about your trip now.

For instance, if your conference is within California or near the west coast are you thinking of driving?

What about lodging, will you room on your own or share expenses with other students? Are you staying at the conference hotel or using a service like Airbnb? Will you prepay your stay using an internet provider?

How good are you about keeping track of your receipts? Do you know what the per Diem rate is for the city you are visiting?

All of these questions are ones you need to consider because what you decide on may have consequences later when you submit your receipts.

Don’t worry, we’ll cover these questions and a few more in this guide.

If you have a question and it’s not covered here do not hesitate to ask for help. It’s never too early to start planning.
More on 2 Step Pre-Approval Process
You will need to include a trip authorization number with your reimbursement, otherwise we cannot process your receipts.

30 Days
All reimbursements must be submitted within 30 days after the end of your trip. Except for posted holidays, our office is open year round (yes, even during spring break and summer session).

Form of payment and your name
If you pay with a credit card and the card is not in your name, we cannot reimburse you for that expense.

Travel Claim
Best Practices
As soon as you can after you return from your trip you will need to submit your receipts for reimbursement. The sooner you begin the process the better (but no later than 30 days), this allows us to work on any issues where timeliness is critical.

The travel claim process will largely depend on your funding source.

Reimbursement Process: State Funds
If your travel is going to be reimbursed from our General Fund, Miscellaneous Trust, or CERF you will be required to use the travel claim (paper version). What this means to you is that you have to turn over your receipts to the Psychology office for processing. If your not sure just ask.

Reimbursement Process: Auxiliaries: (Most Common for Psychology Travel Awardees)
If your travel is going to be reimbursed with from funds in either Research or Tower Foundation either axillary utilizes a paper travel claim to list expenses. You will be required to submit your original receipts to the Psychology Department office for processing.

Here are a few best practices to follow for a smooth and expedited travel claim:

- Provide trip authorization number when submitting receipts. (Research or Tower Foundation claims only.)
- Be sure to turn in original receipts. In most cases copies are not acceptable.
- Include a copy of the conference program listing your presentation/poster.
- When submitting credit card receipts for meal expenditures also submit the itemized receipts as well.
- If claiming mileage include a map i.e. MapQuest, Google Map, etc., with the start and end point address to document miles traveled.
- It’s also a good idea to make copies of all your receipts before you turn in the originals.
- It is not required but very helpful if you include a memo or list of expenses. (Research or Tower Foundation claims only.)
- In your memo it would be helpful if you indicated if you are using actuals or per Diem rate.
- Save yourself some time by only submitting receipts up to your allocation. For example, if you airfare is $250.00 and your lodging costs are $300.00, then you do not need to submit receipts for meals or business expenses because you have surpassed your travel award.

*Source for useless facts from www.statistica.com
Attending and presenting at a conference is a great opportunity and one you should pursue. However, it can put a strain on a student's budget. For that reason students often come up with creative ways to save money and stretch their travel dollars. This section will go over some of the common cost saving measures. Rather than discourage you from pursuing cost saving measures, I want to provide you with the information you need regarding travel policy so that you can make informed choices.

Lodging
Sharing a room together is a great cost saving measure. However, be sure to plan ahead so that you are able to be reimbursed for the costs.

Regardless of the type of lodging used if a student expects to be reimbursed they must present a receipt with their name printed on it. **There are no exceptions.**

- Most hotels will accommodate at least two names on the receipt but you have to tell them ahead of time. To my knowledge Airbnb and similar companies cannot accommodate more than one name on the receipt.
- Another option is to book the room for the night(s) your are paying for in your name and the next night(s) in your roommates' name.
- If you stay with family or friends and purchase a hospitality gift for them, you can be reimbursed for the cost.

Meals
- To per Diem or not. Research Foundation allows the traveler to submit actual receipts for meals and lodging or to request the per Diem rate.
  - Per Diem is a great option if you are not so great at keeping track of receipts. However, be sure to check the rate for the city you are visiting. The per Diem may not cover the costs of what you actually spend on food.
  - If you are good at saving receipts then submitting receipts may be a better option for you since you are reimbursed for the actual cost of the meal.
  - The per Diem rate also includes incidentals. If you submit actual receipts then you must submit receipts for purchases made for incidentals as well.
  - If you share meals make sure to split the receipt or turn in the original receipt highlighting your meal and beverages expenses.

CSU funded travel will reimburse meals based on actual amounts up to $55.00 per day. An individual meal costing more than $25.00 has to have a detailed receipt.

- If you purchase internet access from the hotel you can be reimbursed for it as a business expense.
- Rental Car collision insurance is a reimbursable expense.
- If you use a personal car only the mileage rate in effect for that year will apply for reimbursement.
- Gas receipts cannot be reimbursed, your mileage rate takes into account the cost of gas.

Car Rental and Personal Car Use if the conference is close enough to SJSU i.e. Los Angeles, Las Vegas, Reno, etc. students often opt to share a ride together either in a rental or personal car. There's nothing wrong with that but here are a few things to think about if you do decide to use that option.

- If the city you are traveling to is close enough that you can drive to it but could have flown there you have to compare the cost between the two and claim the lesser expense.
- Your quote must match the same dates of travel and it must be turned in with your receipts. You will be reimbursed for which ever option was the lesser of the two.
- If you rent a car, you can submit the rental and the gas receipts for reimbursement.
- Gas receipts cannot be reimbursed, your mileage rate takes into account the cost of gas.
- If using your own car make sure to fill out and turn in a mileage certification form before your trip.

POLICY: RECEIPTS
Receipt for airfare, conference registration, etc. and payment method must match (applies to credit cards mostly, but also if using PayPal account or other digital forms of payment.)

ONE MORE TIME
Last year alone I had a number of travel claims delayed and some expenses denied because students failed to make sure their name was on the hotel or car rental receipt. Don't be one of them! As a rule of thumb plan ahead and make sure before you check out that the receipt has your name on it and that it is clear which hotel nights were paid for on your credit card.
Important Travel Links
To SJSU Travel, Research Foundation, and Tower Foundation

Travel Authorization:
The “Request for Approval of Travel” form can be found on the Psychology Department website and must be turned in with the travel award application.

This is a tutorial that offers some help in filling out the form if you need it.

Travel Reimbursement
If you applied for the Psychology Department Student Travel Fund you will use this Research Foundation travel claim form for completing the reimbursement request. It’s a fillable pdf and you can fill it out and email it back to the Psychology Department.

Tower Foundation also has its own travel claim form to fill out if the funds are in a Tower Foundation account. This is also a fillable pdf form that you can email back to the Psychology Department.

Travel Guides/Policy
If you have a question regarding an allowable expense or want to know the policy on specific aspects of travel, the following guides will help you answer your questions.

SJSU Travel Guide
Research Foundation Travel Policy
Tower Foundation Policy

Other Useful Links
Fell Travel : SJSU Reservation Online Form (official SJSU travel agency)
Use of privately owned vehicles Certification (Research Foundation)
Per Diem rate- for travel within continental U.S.
Per Diem rate- for travel outside continental U.S. i.e. Alaska, Hawaii, US Possessions and Territories
Per Diem rate- for foreign travel

Travel Check list (RF only)

✓ Fill out travel authorization form and turn in with Student Travel Award application.
✓ Monitor receipt of email with approval of travel award and further instructions.
✓ Monitor receipt of email from Research Foundation with your travel authorization number.
✓ Turn in receipts for processing upon return and be sure to provide travel authorization number.
✓ Reimbursements generally take 10 to 15 business from processing. If it has been more than 15 business days give us a call and we'll check on it for you.
## Travel Funds At A Glance

<table>
<thead>
<tr>
<th>Action Required</th>
<th>San Jose State University</th>
<th>Research Foundation</th>
<th>Tower Foundation</th>
</tr>
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<tbody>
<tr>
<td>Pre-Authorization required before travel</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Can prepay registration with GoCard</td>
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<tr>
<td>Can prepay registration via a requisition</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Can prepay/reserve hotel with GoCard</td>
<td>✓</td>
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<tr>
<td>Requires paper travel claim submission</td>
<td>✓</td>
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<tr>
<td>Allows traveler to claim per Diem rate according to city</td>
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<tr>
<td>Sets a $195.00 per night lodging limit</td>
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Good Luck and Safe Travels!