



Quick Guide To: Student Conference Travel

First things first....

This guide was written with the busy student in mind. The information here isn't meant to be an exhaustive compendium to SJSU travel but rather it is designed to provide direction on key points and processes. Ultimately, it is my hope to make it a little easier to navigate the various travel processes we have on campus

What's covered?

This guide begins by laying out a few items 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 a lot of time, nevertheless become familiar with all the travel rules and policies. Our guide is condensed into an easy to read format with the information you need to be aware of.

Good to Know

Lastly, I have included links to the various travel guides (just in case you

HELPFUL TIP

See the section, "What's Inside" on the left? Click on the hyperlinks (in green) to jump directly to the information you want.

need it) that have served as the main sources for the information I have provided, and other helpful links to tutorials and forms.

The more things change...

As mentioned, the Quick Guide is meant as a resource to help you get started and minimize potential issues. However, 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 you leave to ensure full reimbursement. Waiting until after your trip to discover you have missed a step or violated an important policy can make it impossible to remedy any issues or problems.



[Travel Authorization: What to keep in mind.](#)

With a little planning in advance you can save yourself a headache later. Page 2

[Travel Claim: Best Practices](#)

Best practices and instructions on filling out the travel claim for reimbursement. Page 3

[Savvy Student Traveler](#)

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

[Important SJSU travel links](#)

Tutorials and information on travel guidelines. Find links to these items and a few more. Page 5

[Travel Funds At A Glance](#)

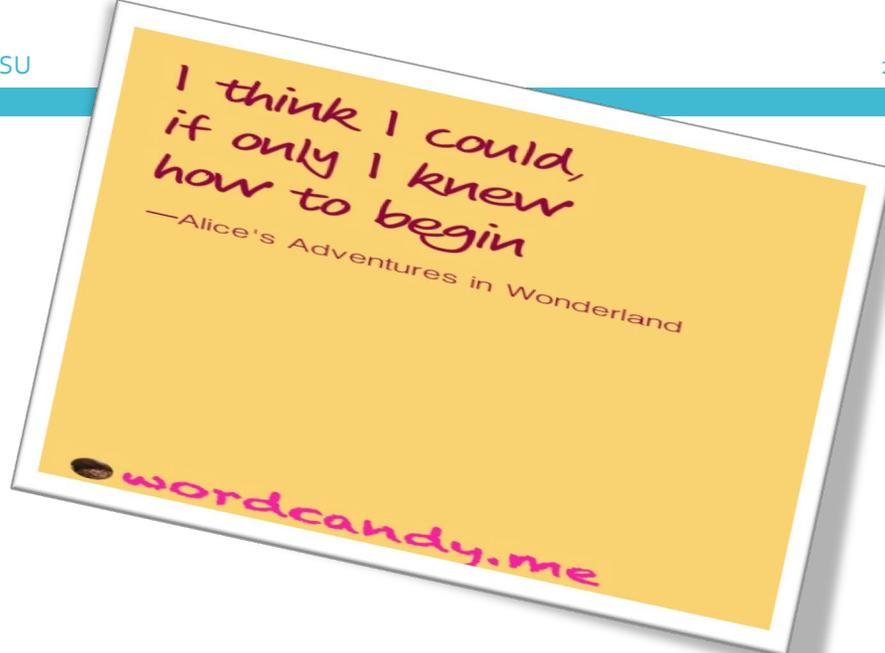
Get a quick overview of the most common requests/action items for all three financial entities on campus. Page 6

Before you leave...

Authorization to travel

In order to apply 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. (See *Appendix A for more comprehensive instructions on filling out the form.*)

- 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.
- What are travel expenses? This would include: lodging, meals, transportation, registration and some business expenses.
- Make sure you remember to sign the form and turn it in well before departure. Verified e-signatures are okay to use.
- Besides the Chair's signature, you also need to obtain the Dean's signature as well. Plan ahead to account for the time it takes to get these signatures.
- Once it is approved you will receive an email from the Chicana and Chicano Studies Department letting you know your authorization has been approved. If you don't hear back within a week send a reminder email or give us a call.
- **REMINDER:** International travel requires at least 45 days in advance (this means the authorization must reach the President's office at least 45 days in advance of departure date) but 60 is recommended for countries not deemed high hazard..



IS THIS REALLY NECESSARY?

If that's not enough to get you going, then keep in mind, neither SJSU nor any of the auxiliaries will process a reimbursement unless an approved authorization is on file.

Have you thought about?



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? What kinds are acceptable?

The answer to these questions are important and will provide direction on how to submit your reimbursement.

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

If you have a question that is not covered here do not hesitate to ask for help. It's never too early to start planning.



DID YOU KNOW?

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.

Alcohol

Keep in mind, SJSU will not reimburse any alcohol expense. Look carefully at any meal receipts and deduct the amount before you turn them in or ask your server to charge them separately.

COMPLETELY USELESS TRAVEL FACTS

70%

Of travellers between 16-29 years of age are looking to include a mix of studying, language acquisition, and working or volunteering opportunities while traveling. (source: <https://wysetc.wordpress.com/research/youth-travel-fast-facts/>)

89%

Of people who travel will experience a drop in stress levels after only a day or two of travel. (source: <https://tinyurl.com/mdkguys>.)

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.)



Travel Claim

Best Practices For Success

Regardless of your funding source you will be required to submit a travel claim if you wish to be reimbursed for expenses incurred. The sooner you begin the process the better, 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

CSU/SJSU Funds and the auxiliaries both use a paper travel claim expense form. Note that they are **not** the same form. So make sure you use the correct form. Links to each one are provided on page 5 in this guide.

You will be required to submit your original receipts to the Chicana and Chicano Studies Department office for processing.

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

- 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.
 - A good memo will outline your expenses clearly. A detailed memo also will help if questions come up.
 - In your memo it would be helpful if you indicated if you are using actuals or per Diem rate (per Diem only applies to Research Foundation).
- This may all seem confusing and a lot to remember, but the most important aspect to keep in mind is that with good recordkeeping and your patience in tact, we can resolve most any issue. And don't forget we are here to help.
- 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.

The Savvy Student Traveler!

Presenting your research at a conference is an important part of your professional development and it is a great opportunity. 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.

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 decisions.

Lodging

Sharing a room together is a great cost saving measure. However, be sure to plan ahead to ensure reimbursement 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 ask the hotel to split the reservation between you and your roommate(s) name(s).
 - If you stay with family or friends and purchase a hospitality gift for them, you can be reimbursed for the cost.
- ➔ Paying for internet access at your hotel is a reimbursable business expense.

Meals

- ➔ To per Diem or not.

Only Research Foundation will allow the traveler to choose between actual costs for meals and lodging or 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 beverage expenses (excluding alcohol).
- ➔ CSU/SJSU 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.

Car Rental and Personal Car Use

If the conference is close enough to SJSU i.e. Los Angeles, Las Vegas, students often opt to carpool. There's nothing wrong with that but here are a few things to think.

- ➔ If the city you are traveling to is close enough that you can drive to it but could have flown there also you

have to compare the cost between the two and claim the lesser expense.

- Obtain an airline quote for the same dates of travel. Turn it in with your receipts. You will be reimbursed for whichever option was the lesser of the two.
- ➔ If you rent a car, you can submit the rental and the gas receipts for reimbursement.
- Rental Car collision insurance is a reimbursable expense. However, SJSU (auxiliaries do not require this) requires that your car rental reservation be made by Fell Travel, otherwise they will not reimburse the cost of insurance.
- ➔ 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.
 - Mileage rate for SJSU reimbursed travel is 54.5 cents a mile.
 - Research Foundation—Mileage rate is 54.5 cents a mile
 - Research Foundation—requires you to have on file an *Authorization to Use Privately Owned Vehicle* form. If using your own car make sure to fill out and turn in a mileage certification form before your trip.

ONE MORE TIME

Students who fail to follow receipt policy will experience delays and in some cases have expenses denied for payment.

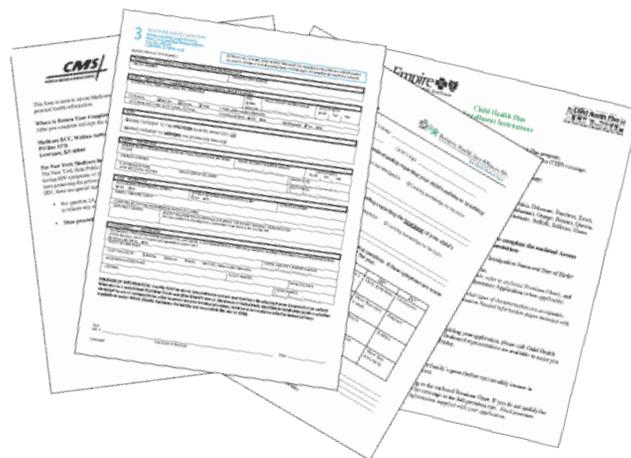
Don't be one of them! Make sure the hotel/rental car receipt has your name on it and that it is clear which hotel nights were paid for on your credit card.

Important Travel Links

To SJSU Travel, Research Foundation, and Tower Foundation

Travel Authorization:

The "[Request for Approval of Travel](#)" form can be found by following the link. A helpful resource is the SJSU Travel Checklist, which provides information on banned states, airfare, and lodging. If you still have questions feel free to reach out to Erlinda in Chicana and Chicano Studies for information on filling in some of the sections (see appendix A for instructions)



Travel Reimbursement

If you received funding from the Chicana and Chicano Studies Department you will use a paper form to claim your expenses and submit receipts.

CSU/SJSU Funded travel will utilize the travel claim [form](#) from the Finance Division to complete the reimbursement request.

For Research Foundation funded travel you will use this [form](#).

Tower Foundation also has its own travel claim [form](#).

Travel Guides/Policy (Sources used for guide)

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

- ✓ Fill out travel authorization.
- ✓ If you are not sure contact Erlinda for information on funding source for your travel.
- ✓ Make sure all reservations/receipts are in your name and keep them in a safe place.
- ✓ When you return organize receipts, write travel memo.
- ✓ Complete travel reimbursement form, turn everything in together.
- ✓ Reimbursements generally take 10 to 15 business days from processing. If it has been more than 15 business days give the department a call for a status update.



Travel Funds At A Glance

<i>Action Required</i>	<i>San José State University Funds</i>	<i>Research Foundation Funds</i>	<i>Tower Foundation Funds</i>
Pre-Authorization required before travel	✓	✓	✓
Can prepay registration with GoCard	✓		
Can prepay registration via a requisition		✓	✓
Can prepay/reserve hotel with GoCard	✓		
Requires paper travel claim submission	✓	✓	✓
Allows traveler to claim per Diem rate according to city		✓	
Set a \$275.00 per night lodging limit	✓		

Good Luck and Safe Travels!

Appendix-A

Instructions for filling in the Travel Approval Form

Chances are you were emailed an Travel Approval form with most of the pertinent information filled in. However, if you downloaded the form directly from the Finance website you will need to fill that in yourself. Below is the information you will need to fill in the sections.

Section I

Department name: Chicana and Chicano Studies Department.

Contact: Should be the department coordinator's name, Erlinda Yañez, erlinda.yanez@sjsu.edu, (408) 924-5760.

Trip Reference Number: Leave this blank, it will be assigned by the Department for you.

Section II

Fill in your name, email, and telephone number. Always check the student box, unless you are employed by a campus auxiliary (e.g. Research or Tower Foundation).

Section III

Travel Type: Business Related (if your trip is paid by CSU funds); Travel Paid by Non-University Funds (if your trip is paid for by an auxiliary or off campus third party). Funding source is not common knowledge, so please do not hesitate to give Erlinda a call or send an email asking for this information. It's rare that we use the Team Travel or Field Supervision Travel so unless you know for sure do not check this box.

Destination: Check the appropriate box for in-state, international, or out of state travel. Include the city/state/country you are traveling to.

Travel Dates: Provide your departure and return dates.

Purpose of Travel: What is your role at the conference? Are you presenting, moderating, part of the organizing committee, etc.?

IV. Estimated Expenses

Be as accurate as possible. If you do not know what your "Amount Approved" is you can email the department or leave this blank, it will be filled in for you.

VI. Chartfield String Information

If the department has not provided this information, leave this area blank.

VII. Authorization Signatures

Sign and date the form as the "Traveler". Validated e-signatures are accepted. Send or walk the form in to the Chicana and Chicano Studies Department.

VII. For International Travel Only

Only fill this section in if you are seeking approval for travel abroad.