



Quick Guide: Student Travel

MCNAIR SCHOLARS QUICK GUIDE TO STUDENT TRAVEL

WHAT'S INSIDE

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 the rules and policies. Our guide is condensed into an easy to read format and provides easy access to the information you need.

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, 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. Do not wait until after your trip to discover you have missed a step or violated an important policy.



[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

Before you leave...

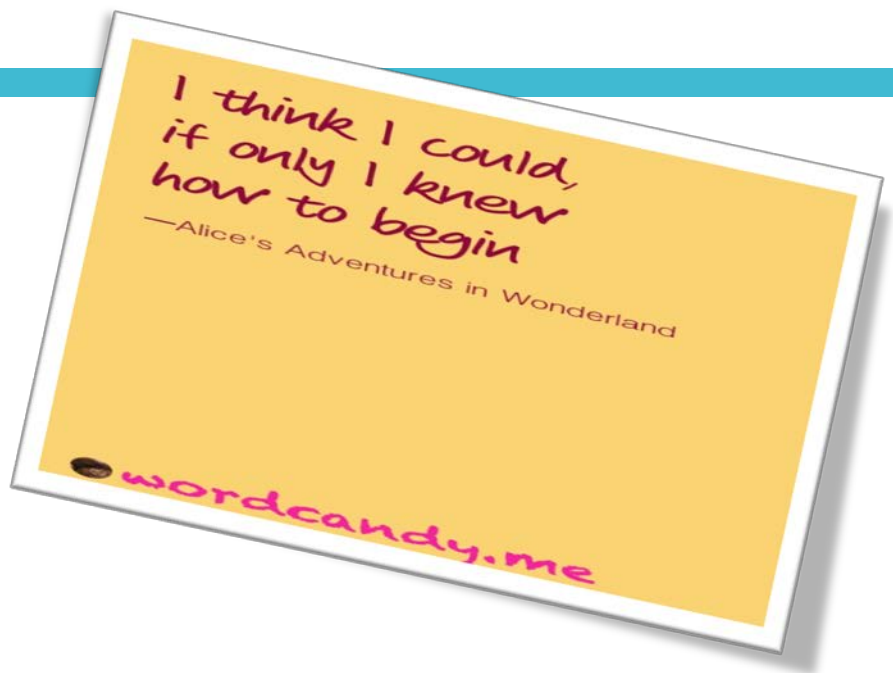
Authorization to travel

McNaire provides support for travel to all of its students. One of the first steps in securing that support is to fill out the travel authorization. Here are some things to keep in mind and tips to help.

- 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 arrange a time to meet with Martha to sign the form and turn it in well before your departure date.
- Remember to plan ahead. You need two more signatures besides

your own. Try to give yourself at least 30 days.

- ✓ Once it is approved you will receive an email from the Research Foundation 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.



IS THIS REALLY NECESSARY?

Research Foundation will not process a travel reimbursement without prior approval to travel. There are no exceptions to this rule.

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? 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.



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 by a credit card and the card is not in your name, we cannot reimburse you for that expense.



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 (source: <https://tinyurl.com/mdkguy9>).

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

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:

After you return from your trip, you have 30 days to submit your receipts and travel claim.

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

- ➔ Provide trip authorization number when submitting receipts.
- ➔ 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.
- ➔ If you were invited to attend a workshop or making a campus visit include the letter or email with the travel claim.
- ➔ 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.
- ➔ If you drove but could have used an airline make sure to include the airline quote. You will be reimbursed for the lesser of the two. Failing to submit the airline quote could create a delay or even a denial of the expense.
- ➔ 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.

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.

The Savvy Student Traveler!

An opportunity to present your research or an invitation to visit a prospective campus 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, savvy 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 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) in your name and the next night(s) in your roommates' name.
- ➔ Paying for internet access at your hotel is a reimbursable business expense.

Meals

- ➔ SJSU Research Foundation will allow the traveler to submit actual receipts for meals and lodging.
- If you share meals make sure to split the receipt or turn in the original receipt highlighting your meal and beverages expenses.

Car Rental and Personal Car Use

If the conference is close enough to SJSU i.e. Los Angeles, Las Vegas, Reno, 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 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.
- ➔ 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 is \$0.585/ 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

In past years a number of travel claims were 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! Before you check out or while returning your rental car check to make sure the receipt has your name on it and that lodging/rental dates are clearly printed.

Important Travel Links

To SJSU Travel, Research Foundation, and Tower Foundation

Travel Reimbursement

For Research Foundation funded travel you will use and fill out the [Request for Approval of Travel form](#). Then after your trip please fill out the [Travel Expense Claim form](#).

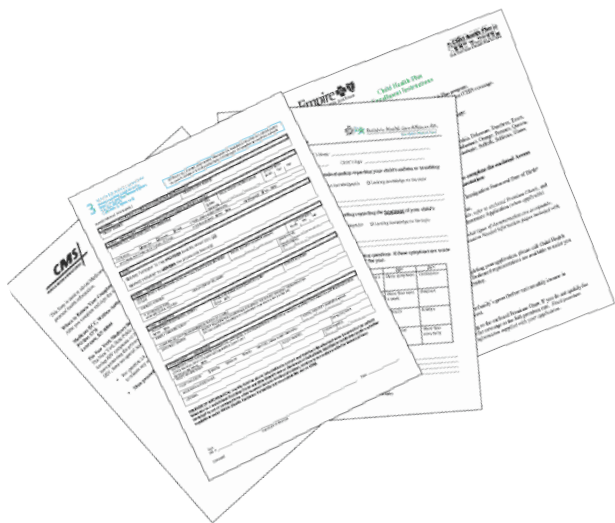
Travel Guide/Policy (sources used)

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.

[Research Foundation Travel Policy](#)

Other Useful Links

[Travel Per Diem Rate Lookup](#)



Student

Travel Check list

- ✓ Fill out travel authorization (Request for Approval of Travel Form). Make sure you have all appropriate signatures needed.
- ✓ Make sure all receipts are in your name and keep them in a safe place.
- ✓ Upon your return, organize receipts, arrange to meet with Martha to turn them in, and complete travel reimbursement (Travel Expense Claim 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.

Forgetting to do one of these steps can delay your trip and/or your reimbursement!

Good Luck and Safe Travels!