



Quick Guide: Student Travel

PSYCHOLOGY DEPARTMENT QUICK GUIDE: 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 things you need to consider before leaving 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 nevertheless become familiar with all the travel rules and policies. Condensed into an easy to read format are all the things you need to be aware of.

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, as well as 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. 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

Traveling Scenarios

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

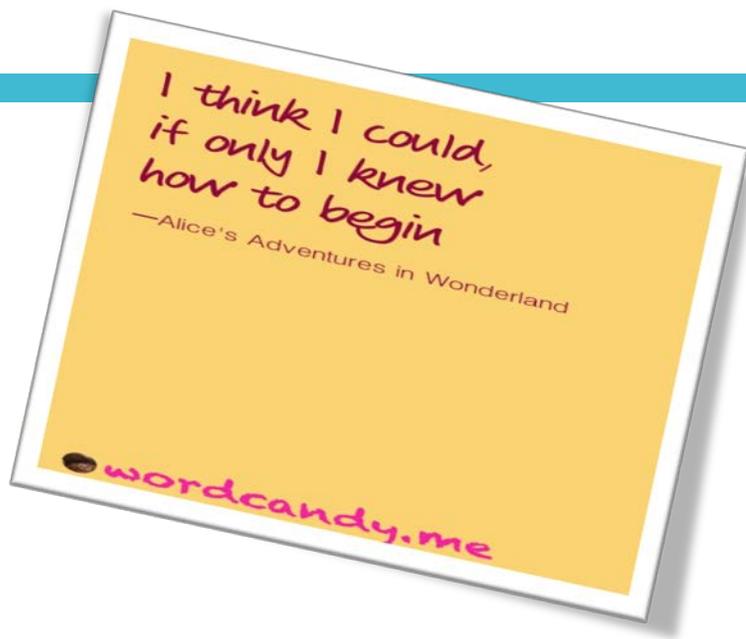
Tutorials and information on travel guidelines. Find links to these items and a few more. Page 5

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

First things first...

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.

- 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.
- 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); 45 is recommended for countries not deemed high hazard; 45 days is

required for those countries that are considered 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.

Are you going to?



Now is the time to start asking a few questions about your trip.

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

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 like Hotwire or Travelocity? What should you consider if you do?

How good are you about keeping track of your receipts? What are your options if you're not? 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 will have consequences later when you submit your receipts.

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

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?

More on 2 Step Pre-Approval Process

You will receive an email with a trip authorization number, keep track of the information it will be needed to fill out the travel reimbursement.

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

Regardless of your funding source you will be required to submit a travel claim. The sooner you begin the process the better, this allows enough time to work on any issues where timeliness is critical.

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 you not sure just ask.

Reimbursement Process: Auxiliaries:

If your travel is going to be reimbursed with from funds in either Research (**most common**) or Tower Foundation they also utilize a paper travel claim to list expenses. You will be required to submit your original receipts to the Psychology Department office for processing.

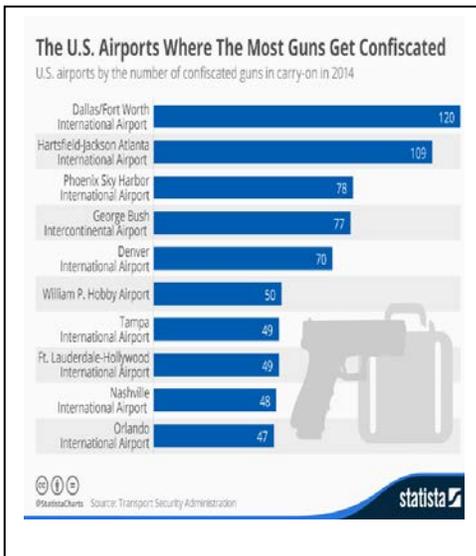
Here are a few best practices to follow for a smooth and expedited travel claim:

- 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; the credit slip only is not acceptable.
- Daily lodging rate is calculated by adding up taxes and hotel rate together
- 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.
- Include airfare quote if you drove instead of traveled by airline.
- If using per Diem, meal rates on the first and last day is calculated at 75%.
- Use notes area to explain business expense or unusual circumstances.
- If the payment method is ambiguous or lost include a copy of your bank statement as proof of payment.

**A copy of a completed sample travel claim is included at the end of this guide.

COMPLETELY USELESS TRAVEL FACTS



33%

Of all domestic business trips in 2012 included air travel to just 11% of leisure travel.

62%

Of Americans (U.S.) have attended a meeting or convention for work in 2009.

*Source for useless facts from www.statistica.com

The Savy 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, 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 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) in your name and the next night(s) in your roommate's name.
 - 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 is a reimburseable business expense.

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 beverage 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.

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 you also could have flown there, 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 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 57.5 cents a mile.
 - Research Foundation—Mileage rate is .54 cents a mile
 - Research Foundation—requires you to have on file an *Authorization to Use Privately Owned Vehicle* form.

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 check to make sure the receipt has your name on it and that it is clear which hotel nights were paid for on your credit card.

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.)

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 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.

Tower Foundation also has its own travel claim [form](#) to fill out if the funds are in a Tower Foundation account.

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

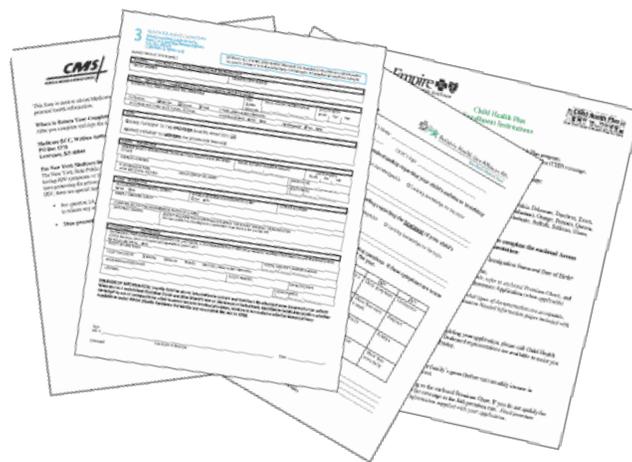
[Fell Travel : SJSU Reservation Online Form](#) (official SJSU travel agency)

[Authorization to Use Privately Owned Vehicle](#) (Research Foundation)

[Per Diem rate](#)-for travel within continental U.S.

[Per Deim 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.
- ✓ Complete travel reimbursement, turn in receipts.
- ✓ Reimbursements generally take 10 to 15 business 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 Jose State University</i>	<i>Research Foundation</i>	<i>Tower Foundation</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!

