

# **ORSP Departmental Travel**

**(Updated 08/09/17)**

When traveling on ORSP/University business, please keep in mind all the policies and procedures that apply to SFSU employees. Please review the travel policy carefully. (<http://fiscaff.sfsu.edu/content/csu-travel-policy-0> )

If you have any questions, please contact the Travel Department, Julie Paez or a manager. Please find below a list of frequently asked questions.

***Q: Am I required to prepare and obtain approval before making travel arrangements?***

A: Yes, you must complete the standard "Request for Authorization to Travel" form. If traveling outside of California, Provost approval is also needed. Complete, obtain manager approval and submit to Julie Paez.

***Q: When researching lodging, I realized my hotel cost will be over \$275 per night (excluding taxes). Do I need additional approval?***

A: Yes, in addition to the Authorization to Travel, you must also prepare the "Authorization for Exception to Travel Policy." Attach the exception form to the authorization to travel form and submit to Julie Paez who will obtain approval by the Provost.

***Q: How do I register for a conference or training seminar?***

A: After obtaining an authorization to travel, e-mail Julie Paez a link to the conference website. If there are multiple choices for registration, indicate which conference you would like to attend (i.e., will you attend the pre-conference, etc.). If you are a member or need to become a member before registering, indicate this in the e-mail as well.

***Q: My conference is in a state, which according to AB 1887, may not be visited using University funding. Am I able to attend this conference and will I be reimbursed?***

A: No. The University cannot approve state-funded or state-sponsored travel to states that have enacted a law that voids or repeals existing state or local protections against discrimination. The list of states may change periodically and it is maintained on the California State Attorney General's website at <https://oag.ca.gov/ab1887>. As of 6/26/17, the states include Alabama, Kansas, Kentucky, Mississippi, North Carolina, South Dakota, Tennessee and Texas. There are exceptions such as participating in meetings or training required by a grant or required to maintain grand funding. See Julie Paez, a manager or the Travel Department for additional questions or clarification.

***Q: Will ORSP pay for my flight or must I be reimbursed?***

A: ORSP has a travel P-card and may book flights. Alternatively, you may book your own flight and be reimbursed directly.

**Q: *What does ORSP need from me to book a flight?***

A: Send Julie Paez an e-mail and include (1) your legal name (what is indicated on your government issued identification); (2) date of birth, (3) aisle or window preferred. If you have a link to the flight itinerary, send this as well. If not, indicate (4) departure/return dates and approximate times; (5) departing/arriving airports.

**Q: *Will ORSP pay for my lodging or must I be reimbursed?***

A: The ORSP travel P-card does allow for booking/paying hotel rooms; however it is preferred you book and pay for lodging and when you return from your trip you submit a travel reimbursement claim within 30 days of returning.

**Q: *I am staying multiple nights and prefer not to pay for lodging. Could ORSP make a prepayment?***

A: The ORSP travel P-card does allow for booking/paying for hotel rooms. All hotels differ in their procedures for prepayment but generally, you will need to book the hotel and let them know you will be using a departmental credit card for prepayment. The hotel will let you know what paperwork they will need us to complete. Once you receive the instructions and/or forms work with Julie Paez. When you check into the hotel, you will need to provide your own personal credit card for incidentals.

\*\* Keep a copy for your records as you will need to indicate this amount on your own travel reimbursement form. ALL PRE-PAID expense(s) need to be included on your travel reimbursement claim. This includes registration, airfare and hotel.

**Q: *Does SFSU have any resources to help with booking my travel?***

A: Yes, you could contact Fell Travel, SFSU's approved traditional travel agency, and they can assist you with booking flights, hotels and other travel related needs. You will need to provide a credit card. See <https://fiscaff.sfsu.edu/content/fell-travel> or call (650) 827-7300.

**Q: *What if I need to rent a car?***

A: Log into SFSU Gateway, click on Employee Services. On the right side, you will see a link to SF State Travel Center. Click on that link and then click on Enterprise / National Car Rental Reservation and follow the instructions.

[https://legacy.enterprise.com/car\\_rental/deeplinkmap.do?bid=028&refId=CASUBUSE](https://legacy.enterprise.com/car_rental/deeplinkmap.do?bid=028&refId=CASUBUSE)

An Enterprise office is also located near SFSU at 33 Cambon Drive, SF (415) 337-9000.

It is **imperative** that you complete the Defensive Driving Training before your trip or you will NOT be reimbursed for any transportation expenses associated with driving. See Fiscal Affairs link to "Driving on State Business/ Defensive Driving Training."

In addition, all employees who wish to drive a private vehicle must be certified by the Department of Environmental Health and Operational Safety (EHOS) and must have adequate liability insurance. The requirements for driving a private vehicle on University business are at <http://ehs.sfsu.edu/content/driver-safety-program>

\*When you travel on University business, you are expected to use the rental agencies with which the CSU has negotiated contracts that include insurance. Additional charges for insurance coverage will not be reimbursed if a non- contracted agency is used, unless vehicles are unavailable from a contracted vendor.

**Q: *How will I get reimbursed after my trip?***

A: You will need to complete a travel claim (“Combined Travel Claim & Itemized List of Actual Expenses”). Please note there are two pages on this form. Indicate your expenses on the second page which should then transfer to the first page; however, verify it has transferred. Complete the form thoroughly or the Travel Department will return for additional information (i.e., time of departure, location, type of transportation used, etc.). You need to indicate all PRE-PAID expenses such as registration, airfare and hotel. **You need to submit your travel claim to the Travel Department within 30 days after you return from your trip.**

Lastly, ORSP has created a travel training video that may help in completing the reimbursement travel form. This video focuses more on reviewing travel claims but could be helpful with completing as well. Access through the ORSP website, click “ORSP Staff Only,” click Trainings and Videos.

**Q: *What back-up documents need to be attached to the travel claim?***

A: Include your approved Authorization to Travel, flight itinerary, itemized lodging receipt, any receipt for purchase \$75 and over, car rental receipt, and conference or training agenda. If you do not have a receipt, only a statement not showing the payment, proof of payment method needs to be included by either a copy of your credit card statement or cancelled check.

**Q: *What about my meals? Will I be reimbursed?***

A: Yes, review the travel policy but generally for trips over 24 hours you will be reimbursed for breakfast, lunch and dinner. You will NOT be reimbursed for meals that are included at the conference. You will be reimbursed for the actual cost, with a cap of \$55/full day. Attach your receipts but not needed for expenses under \$75.

**Q: *What about incidentals? Will I be reimbursed?***

A: You can also be reimbursed for incidentals, such as snacks or tips starting on your second day of travel. The current incidental rate is \$7.00 per day.

**Q: *What are business expenses? What should I include in this column?***

A: Items such as Internet charges, baggage fees, if you are paying for lodging or meals for anyone else. If paying for others’ lodging or meals, you will need to attach a mock travel claim (lodging) or a hospitality claim form (meals).

***Q: When must I submit my travel reimbursement claim to the Travel Department?***

A: Once you, as the traveler, and Susan Pelton or Michael Scott as the approver, sign the claim, submit within **30 days of the end of the trip**.

***Q: What if I want to combine personal travel with business travel? Is this allowable?***

A: If the vacation day(s) fall on your regular work days (M – F), you will need to obtain approval for and use vacation time. Additionally, you will only be reimbursed for the expenses during your business trip, not during your personal travel days. Lastly, Travel Department will need a price comparison for your flight where the least amount will be reimbursed. Attach the flight itinerary/cost if you were to return after your business trip and also attach the itinerary/cost of your actual flight return. If you are traveling internationally and if at least 25% of the trip was personal, the airfare is taxable.

***Q: I have additional questions. Who should I ask?***

A: Contact the Fiscal Affairs Travel Department (Edward @ 8-2604 or Cindy @8-2629), Julie Paez in ORSP @5-3995 or your manager.