

Travel Policy and Procedures for IES employees (8_6_2024)



Purpose: This document provides information and detailed instructions on how external service providers can request travel reimbursement.

Travel Reimbursement Standards:

Any individual traveling for the Academy for Professional Excellence is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of business are not acceptable under this standard. Individuals are responsible for excess costs and any additional expenses incurred for personal preference or convenience.

If you believe you are eligible for and/or require travel related reimbursement to provide services for Academy Programs please review the information below prior to submitting a request.

All travel reimbursement requests will need to be approved **at least 30 days prior to travel by the Academy for Professional Excellence Travel Specialist (Dale Marcikic dmarcikic@sdsu.edu).**

DO NOT purchase or reserve anything without first getting approval from the Academy for Professional Excellence. Without prior approval your reimbursement may be denied.

See Process for Submitting a Request for Travel Reimbursement below. We are able to reimburse for the following travel events:

- Requires airfare (including mileage/transportation to and from the airport and per diem, guidelines below).
- Hotel accommodations for multiple-day trainings (including per diem) and/or when the training location is more than 100 miles from your home.
- When the distance to a training location is over 100 miles each way from your home.

If you anticipate needing travel reimbursement for your services with the Academy, please inform the Academy Travel Specialist (dmarcikic@sdsu.edu) once you've been confirmed to deliver a service so that we can prepare the proper paperwork and approvals to meet the guidelines the San Diego State University Research Foundation (SDSURF) requires for travel reimbursements. All travel expenses will be reimbursed after the service event according to the requirements below.

Process for Submitting a Request for Travel and Travel Reimbursement:

Step 1:

As soon as you become aware of an upcoming need for travel, please download and complete the Updated [Academy/IES Travel Request Form](#), to report projected costs and general information supporting your need for travel. Requests **must be received thirty (30) or more days prior to travel dates**. If you fail to submit your request within the required 30-day notice, your request could potentially be denied.

Step 2:

Email your completed Academy/IES Travel Request Form to the Academy Travel Specialist (Dale Marcikic - dmarcikic@sdsu.edu). The email should include a google map showing the distance from your home to the training location and a flyer for your training date(s).

Step 3:

Dale Marcikic will reach out to you to let you know whether or not you have been approved for travel from both the Academy and SDSU Foundation.

Step 4:

If not approved please circle back with your Academy contact to discuss.

If approved you may now make reservations and travel purchases (such as airfare and hotel).

Allowable expenses for reimbursement once multi day travel is approved:**Lodging (receipts required)**

- Hotel/lodging expenses will be reimbursed according to the [CSU General Services Administration website](#). Exceptions to this rate (i.e. no available rooms at this rate) must be requested with an explanation and prior approval.
- Valet parking expenses are not allowable for reimbursement. Please use self-parking at the hotel. If self-parking is not available at a given hotel, you will need to include a memo to that effect when submitting for reimbursement.

Airfare (receipts required)

- All air travel must be **economy or coach class**, and special, low-cost rates should be used when possible. If any other class of air travel, such as "first class," "business class" or "economy plus" is requested, SDSU Research Foundation is responsible for the basic economy or coach rate only, and a screenshot of the economy class or coach rate from the airline must be provided. The reimbursement would be the lowest (economy/coach) rate.
- **CAUTION:** Should you choose to use your frequent flier benefits to acquire airline tickets for business use, you are **not** eligible for reimbursement of the cost of a comparable ticket.

Per Diem Allowance - Meals and Incidental Expense (no receipts required)

- To determine Per Diem rates for multi day travel, [here are our most used training locations and associated Per Diem rates](#). If you're traveling somewhere else, please use the [CSU General Services Administration](#) website to determine your allowable Per Diem rates.
- CSU has a new policy that "Travel Days" meaning travel to and from a training location, receive 75% of the total Per Diem possible at your training location (by zip code) regardless of the time of day you travel. If your trip has more than two days, then those "in between" days you can use the total Per Diem allowable. If the training you attend provides a meal, that should be deducted from your total per diem for that day.

Personal Car use (Mileage reimbursement) google map required**Step 5**

Travel reimbursements come from the SDSU Research Foundation (SDSURF) Accounts Payable department. As such SDSURF will need your banking information so they can reimburse you via electronic direct deposit.

If you have never received a travel reimbursement, you will be asked to submit your information via “**PaymentWorks**,” to a secure banking information management system. This will allow the SDSU Research Foundation to direct deposit your reimbursements.

If you have already received travel reimbursements, then you are currently in the system and no action is necessary in this step.

Step 6 Travel takes place

Step 7 Post travel steps for travel reimbursement:

1. For pre-approved travel requiring mileage reimbursement alone (single day travel when training location is more than 100 miles from your home (more than 200 miles round trip), complete the [SDSURF 2024 Mileage Reimbursement Form](#). Supporting documentation for this includes a google map and training flyer.
2. For pre-approved multi-day travel that included, but is not limited to hotel, per diem (in some cases flight), complete the [SDSURF 2024 Travel Reimbursement Form](#): Supporting documentation for your Travel Reimbursement includes training flyer/meeting agenda and associated travel receipts showing payment (e.g., airline receipt, parking, lodging, and other transportation receipts).
3. **Email completed UNSIGNED excel form (linked above) to Dale Marcikic (dmarcikic@sdsu.edu) along with associated receipts and supporting documentation.** SDSURF will send the reimbursement via direct deposit (reimbursements typically take about 30 days once received by Dale).

ADDITIONAL NOTES:

- If you fail to submit your request within the required 30-day notice, your request could potentially be denied.
- **Cancellation policy**: If a training is canceled, changed and/or rescheduled, you will be notified as soon as possible. Unfortunately, since the service deliverable did not occur, we are not able to reimburse for any travel-related fees associated with the cancellation.
 - When a training is canceled, changed to virtual or rescheduled, please notify Dale Marcikic (Travel Specialist - dmarcikic@sdsu.edu) of the change asap.