



POLICY: ASI TRAVEL
EFFECTIVE DATE: MARCH 23, 2001
REVISED DATE: JUNE 20, 2016
APPROVAL DATE: DECEMBER 10, 2021

DEFINITIONS

Domestic Travel:

ASI travel within the United States. This includes Alaska and Hawaii.

Group and Programmatic:

One ASI staff or student employee is the lead (paying for travel expenses), and the other traveler(s) are employees, participating in the travel without incurring expenses.

Non-Employee:

Prospective employees, consultants, and students who are traveling on ASI business.

Participants:

ASI staff, student employees, or other traveler(s) are employees, participating in the travel without incurring expenses.

PURPOSE

To establish policy and for Associated Students, Inc. of California State University San Marcos (herein called ASI) funded staff and student travel that support the mission statement of ASI and ensure proper stewardship of the allocated funds.

POLICY

- I. Travel includes, but is not limited to, conferences, seminars, workshops, retreats, trainings and meetings which enhance the growth of the organization, staff and/or student, and ASI as a whole. Only domestic travel is allowed unless approved by the University President.
- II. ASI categorized travel into the following four types:
 1. Individual Staff Travel
 2. Individual Student Employee or Representative Travel
 3. Group/Programmatic Travel
 4. Non-Employee Travel
- III. Approval Guidelines
 1. Supervisor and/or Funding Authority ensure all expenses are authorized, necessary, and supported by an ASI business/program purpose.

2. Make certain that the expenses incurred are necessary for the purpose of the trip. The traveler is responsible for any excess costs or additional expenses incurred for personal preference or convenience.
3. Conduct yourself in a manner that is in accordance with the CSUSM Corporation Employee Handbook and for students the CSUSM Student Code of Conduct

IV. Transportation

1. Air Travel

- a. Coach or Economy Class – Coach or economy-class fare shall be used whenever ticketing restrictions are reasonable.
- b. Baggage and Seat Selection Fees – Checked baggage fees or seat selection fees (for coach or economy-class fares) are an allowable expense so long as they are considered reasonable and necessary for the business purpose and length of the trip.
- c. *You will not be reimbursed for any additional insurance. Exceptions can be made with the approval of the ASI Executive Director.*

2. Vehicle (Personal or Rental)

- a. Drivers must possess a valid driver's license and must be Defensive Driving certified.
- b. When driving instead of flying, the traveler will be reimbursed for the lesser of the two expenses
- c. Drivers are responsible for carrying and maintaining auto insurance.
- d. ASI will use the CSUSM guidelines for mileage reimbursement. Proper mileage documentation must accompany the Travel Expense Claim Form. When two or more employees share a private vehicle, only the driver may claim reimbursement for mileage.
 - a. During Working Hours: Reimbursement shall be made between the traveler's residence and the destination, or the work location and the destination, whichever is less. Exceptions can be made with the approval of the Executive Director.
 - b. During Non-working hours: Reimbursement shall be made between the traveler's residence and the destination.

V. Lodging

1. Lodging expenses are covered only when the conference is for multiple days and further than 25 miles from the university. Exceptions must be requested in writing and may only be granted by the ASI Executive Director.
2. Hotel rate is determined by the CSUSM approved rate.

VI. Meals

1. Meals which are not provided by the event and which meet the criteria listed below are paid by per diem worksheet must accompany all green travel forms if per diem is requested.
 - a. Breakfast: May be claimed only if travel begins before 7:00 AM on the departure date, is not provided by the conference or ends past 9 AM on the return date.
 - b. Lunch: May be claimed for travel that begins before 11 AM on the departure date, is not provided or ends past 1 PM on the return date.
 - c. Dinner: May be claimed when travel begins before 4 PM on the departure date or ends past 6 PM on the return date.
 - d. Incidental expenses are allowed after the first 24 hours and for every full 24-hour period thereafter.

- e. Automobile mileage reimbursement is determined by the CSUSM approved rate.

PROCEDURE

II. Pre - Travel

1. A green colored Request for Travel Form is used to authorize any travel, travel advances and/or registration. This is a trip specific form and is required to be completed and signed before the trip arrangements are made. One form per person per trip.
2. All travel must be pre-approved either before the payment of any travel expenses, or two days prior to travel, whichever comes first.
3. Approval prior to travel must include a completed Request for Travel Form estimate with all required signatures. The funding account, fund, department, and total estimate must be indicated.
4. ASI will, in most cases, pay for transportation, lodging, registration, per diem and miscellaneous expenses.
5. One form per person per trip.
6. This form must be signed prior to travel by the traveler, the traveler's supervisor, the Executive Director, and the Associate Vice President of Student Life. Signature signifies approval of all estimated expenses.
7. Each traveler must complete a Release of Liability, Promise not to Sue, Assumption of Risk, and Agreement to Pay Claims form and read the accompanying letter from the ASI Executive Director for each and every occurrence and must be included in the travel approval packet.
8. Only requests for International Travel must also be signed by University President.
9. Per Diem, mileage and incidentals are paid by check to traveler prior to travel.

III. During Travel

1. All ASI professional staff and student employees who have an ASI Pro Card must use their card for reimbursable expenses which includes excess baggage charge and parking charges not included in a hotel bill.
2. Each traveler must keep all itemized, original receipts for items purchased during travel on ASI Pro Card.

IV. Post – Travel

1. Submit Travel Expense Claim Form with proper documentation to the appropriate approving authorities for signatures.
2. All post travel documentation is due to the ASI Front Desk within three business days upon return.
3. Back up documentation is required in the form of original itemized receipts for all expenses incurred while traveling except for cash advance items (meals, miscellaneous and mileage).
4. An ASI Expenditure Request Form must accompany receipt(s).
5. Original itemized receipts must show a zero-balance due. If a receipt of any amount is missing and a duplicate cannot be obtained, the traveler is to:
 - a) complete a Lost/Missing Receipt Verification Form
 - b) send an email to the designated ASI Professional Staff member with date of purchase, purchase

- amount, vendor, and description of items purchased.
6. The traveler is personally responsible for any excess costs or additional expenses incurred for personal preference or convenience.

RELATED DOCUMENTS

- I. ASI Expenditure Request Form
https://www.csusm.edu/asi/documents/forms/asi_expenditure_request_form_erf.pdf
- II. Lack of Itemized Receipt Form
https://www.csusm.edu/asi/documents/forms/appendix_iii_lack_of_itemized_receipt_for_m_fillable.pdf
- III. ASI Pre-Travel Approval Form
https://www.csusm.edu/asi/documents/forms/asi_travel_pre-travel_approval_form_greenform.pdf
- IV. ASI Per Diem Worksheet
https://www.csusm.edu/asi/documents/forms/asi_travel_per_diem_worksheet.pdf
- V. Post Travel Form (Travel Expenses Claim Fillable Form)
https://www.csusm.edu/asi/documents/forms/asi_travel_post_travel_form.pdf
- VI. Release and Hold-Harmless Statement
https://www.csusm.edu/asi/documents/forms/asi_travel_release_and_hold-harmless_statement.pdf
- VII. Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims
https://www.csusm.edu/asi/documents/forms/asi_travel_release_of_liability.pdf
- VIII. Student Conduct Agreement
https://www.csusm.edu/asi/documents/forms/asi_travel_student_conduct_agreement.pdf