

ASI TRAVEL GUIDELINES

Types of Travel-Travel includes, but is not limited to, conferences, seminars, workshops, retreats, center activities and meetings which enhance the growth of the organization, staff and/or student, and ASI as a whole. Only domestic travel is allowed.

- A. **Group Travel** –Group Travel is when one or more staff is traveling in a group. There is a LEAD who pays for the expenses (typically using a ProCard) and the other traveler(s) who are either a staff, non-employee consultant, non-employee independent, non-employee student, non-employee recruitment, non-employee volunteer.
- B. **Individual Staff Travel**
- C. **Individual Student Employee Travel**
- D. **Non-Employee Travel (Recruitment/Consultant/Independent Contractor/Volunteer/Student)** – Non- Employee travel consists of travel associated with individuals who are not employed by ASI.

Procedures Prior to Travel: Approval prior to travel must include a complete travel estimate and signatures. ASI will, in most cases, pay for transportation, lodging, registration, per diem and miscellaneous expenses.

- 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. This form must be signed prior to travel by the traveler, the traveler's supervisor, the ASI Vice President of Finance, Manager of Operations and the Executive Director. Signature signifies approval of all estimated expenses. Each traveler is responsible for making his/her own airline reservations for economy or coach class rate, and special low-cost government rates if possible.
- 2.) When opting to drive instead of fly, the traveler will be reimbursed for the lesser of the two expenses and must provide documentation showing what the flight would have cost as well as a written explanation of why that choice was made.
- 3.) 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 **Executive** Director for each and every occurrence. The Memo from Executive Director re: Air and/or Ground Travel and the Release of Liability Form, form must be included in the travel approval packet.
- 4.) Students traveling must fill out the ASI Student Conduct Agreement for each travel occurrence.
- 5.) All ASI professional staff and student employees who have an ASI Corporate Credit Card must use their card for reimbursable expenses which includes excess baggage charge and parking charges not included in a hotel bill.
- 6.) Per Diem, mileage and incidentals are paid by check to traveler prior to travel. Meals which are not provided by the event and which meet the criteria listed below are paid by ASI A 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

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the departure date, is not provided by the conference or ends past 9 AM on the return date. Rate is determined by the CSUSM approved rate.

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. Rate is determined by the CSUSM approved rate.

c) Dinner: May be claimed when travel begins before 4 PM on the departure date or ends past 6 PM on the return date. Rate is determined by the CSUSM approved rate.

d) Incidental expenses are allowed after the first 24 hours and for every full 24 hour period thereafter. Rate is determined by the CSUSM approved rate.

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

7.) Hotel 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 Executive Director. Hotel rate is determined by the CSUSM approved rate.

8.) The funding account, fund, department, and total estimate must be indicated.

Procedures Upon Return From Travel-A Travel Expense Claim Form must be completed by the traveler subsequent to travel.

1) 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). 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 or
- b) send an e-mail to the ASI travel coordinator with date of purchase, purchase amount, vendor, and description of items purchased.

2) An ASI Expenditure Request Form must accompany receipt(s).

3) All post travel documentation is due to the ASI Corporate Office within three business days upon return.

The traveler is personally responsible for any excess costs or additional expenses incurred for personal preference or convenience.