



To: CSUSM Faculty & Staff

From: Brittani Brown, Assistant Vice President, Compliance and Operations

Following the recent CSU Audit and Investigative Services investigation and CSUSM internal review regarding travel and fiscal stewardship, many of you have had questions, and we heard it would be helpful if we provided some clarification on a few points. Thus, I am writing to provide you an update on our fiscal stewardship efforts, along with some reminders, resources and information.

I know many still have questions, and the Travel Office is here to help.

The Travel Office is pleased to now offer a variety of training and assistance, including:

- Hands-on assistance with preparing travel forms (including Adobe Sign) and supporting documentation, reviewing authorizations and claims, booking travel, approving authorizations and claims;
- General travel training;
- International travel training;
- Group and one-on-one training.

For **general travel training**, the following dates and times are scheduled for March:

- Wednesday, March 4 from 1 to 2 p.m. in Academic Hall 209
- Thursday, March 12 from 11 a.m. to noon in Academic Hall 209
- Wednesday, March 18 from 10 to 11 a.m. in Academic Hall 209
- Thursday, March 26 from 2 to 3 p.m. in Academic Hall 209

In addition, beginning March 3, weekly travel help sessions will be available **every** Tuesday from 10:30 to 11:30 a.m. Simply bring your materials to Academic Hall 209 for personalized assistance from the Travel Office, at any stage of your travel approval process.

Fiscal Stewardship News and Updates

The Travel Office has been compiling information, questions and concerns from listening and education sessions. We are working toward a more streamlined “OneCSUSM” process for travel

authorization and claims as well as researching travel planning services and preparing for the conversion to travel software.

We are aiming to streamline future changes strategically so that we can minimize frequent updates and lessen the burden on the campus community. However, we are committed to communicating future changes via email and the [Fiscal Stewardship website](#), while ensuring training is in place every step of the way.

To support these efforts, Finance and Administrative Services has added resources and restructured the Travel Office. Organizational Development Manager Shannon Honour now reports to me with lead oversight of our current Travel Coordinator Angela Sanchez and our soon-to-be hired new travel coordinator – a position we estimate to be in place by the end of May.

A Few Additional Travel Tips and Reminders

I heard from many that it would be helpful to provide some additional travel tips and reminders. Here are some of the most significant tips and reminders as you are preparing travel-related documentation:

- For domestic travel, travelers are allowed meal reimbursements only for actual costs incurred up to \$55 per day, and no per diem amounts are allowed. (I know this one has been particularly confusing – please reach out to me or the Travel Office if we can help answer any questions).
- All expenditures for a single trip should be reported on one travel expense claim. Supplemental claims may be submitted if necessary but must be clearly marked “supplemental” and must identify the original claim submitted in connection with the travel.
- A ProCard should be used to pay for all registration fees, minimizing the need for employee reimbursements in a supplemental travel expense claim.
- Effective April 1, supplemental claims for registration will not be approved. If the traveler does not have access to a ProCard, please contact the Travel Office for assistance in paying for your registration fees.
- Hotel claims should only be reimbursed with clear proof of payment. A hotel confirmation cannot serve as a receipt for payment.
- Dates and locations of all receipts should be reviewed and reconciled with where employees' travel occurred.
- Hotel lodging cost preapproval forms must be approved prior to travel.
- Business- and first-class airfare cannot be approved without documented justification.

Thank you to everyone who has brought forward your ideas, comments and questions. Please feel free to contact me to set up an education/listening session, training, or with any other questions or comments you may have. Your feedback is important to me.