

6.4 Travel Guide and Checklist

Official travel **requires prior approval** of the director and must be in accordance with the General Travel Policies of Washington State University ([BPPM 95.01](#)). A traveler must have prior approval to be eligible to travel and be reimbursed for travel expenses. Reimbursement for all expenses will occur only after the completion of travel and submission of required receipts no later than the 10th of the month after the conclusion of travel.

Steps to Travel:

1. Traveler will complete and submit the [Pre-Travel Worksheet](#) to the administrative assistant. Hosting faculty will also complete a Pre-Travel Worksheet when they request travel for a guest lecturer, critic, or other outside party.
2. The administrative assistant works with administrative manager and the director for funding approval prior to creating Travel Authorization (TA).
3. After the TA has been created the administrative assistant will log the travel request and help to plan travel by:
 - a. Authorizing and arranging airfare on Central Travel Account (CTA), if necessary. Faculty and staff can pay for their own airfare and submit a copy of the itinerary for reimbursement on the Travel Expense Voucher (TEV). The receipt must show proof of payment.
 - b. Processing conference registration using purchasing card or purchase order. Faculty can pay for registration and request reimbursement on the TEV. The receipt must show proof of payment.
 - c. Creating and authorizing motor pool, charter bus, or rental car reservations:
 - i. If the traveler makes his/her own rental reservation using the WSU contract rate, please be sure to **decline the additional insurance coverage** since it is already included in the contract rate. More information is available here: [Rental Car & Private Auto](#).
 - ii. Travelers may also use their own personal vehicle when a motor pool vehicle is not available or when it is more advantageous or economical to the university to do so. *Travelers will be reimbursed for vehicle miles only.* Mileage may be claimed by using maps (sources such as Google Maps are acceptable), highway guides, or actual odometer readings. A mileage chart is available through the [Washington State Department of Transportation](#).
4. After travel has been completed, the traveler must submit a [Travel Expense Worksheet](#) (TEW) and all required receipts to the administrative assistant **no later than the 10th day of the month following any completed travel**.
 - a. For example, if you travel from January 15 – January 31, all documentation must be turned in by February 10. [See [Deadlines in BPPM 95.20](#)]
5. The administrative assistant will create a draft TEV in [WSU E-Forms](#) and assist faculty and staff with completion; attain necessary signatures and submit form to WSU Travel for final

processing. A paper TEV will be created for non-WSU travelers and assistance with completion will be provided as necessary.

6. The administrative manager will monitor accounts for proper posting of expenses and budget approvals.

Travel Checklist:

- Submission of Pre-Travel Request
- Confirmation of approval and creation of Travel Authority
- Coordination of flights, motor pool, or other arrangements necessary for travel
- Submission of Travel Expense Worksheet and receipts no later than the 10th of the month after the conclusion of travel.

Approving Travel:

An approving administrator must use the following criteria when authorizing a person to travel on official state business and determining travel alternatives:

1. *Economical.* Administrators and travelers are to select the travel alternative that is most economical to the state. All costs, e.g., travel, labor, should be considered when making the determination. For example: Is it less expensive to drive than fly out of Spokane Airport? Is it cheaper to fly out of Spokane than out of Pullman?
2. *Advantageous.* Administrators and travelers are to select the travel alternative that is most advantageous to the state.
 - To ensure the health and safety of agency travelers (see [Ensure Health and Safety](#)).
 - To comply with the Americans with Disabilities Act (see [Compliance with ADA Act](#)).
 - To process approval for meals with meetings (see [BPPM 70.31](#)).
 - To authorize the use of privately owned motor vehicles (see [BPPM 95.11](#)).
3. *Alternatives to Travel.* Before approving travel, an administrator is to evaluate travel alternatives which may achieve the same result for less money, i.e., teleconferencing, video conferencing, mailing video recordings or published reports, reducing the frequency of scheduled out-of-town meetings, carpooling, or use of public transit. ([SAAM 10.10.25](#))
4. *Limit Numbers.* The number of sponsored travelers attending a meeting should be the minimum necessary, consistent with the benefit to WSU.
5. *Excessive Expenses.* The university does not reimburse excessive or unnecessary expenses.

Traveler's Responsibilities:

A traveler on official state business is responsible for the following. ([SAAM 10.10.15](#))

1. *Regulations.* Being familiar with state and University travel and transportation regulations before embarking on travel.
2. *Prudent Judgment.* Exercising the same care in incurring expenses and accomplishing the purposes of the travel that a prudent person would exercise if traveling on personal business. Excess costs, circuitous routes, delays, or luxury accommodations unnecessary or unjustified in the performance of official state business travel are not acceptable.
3. *Personal Preference.* Paying any excess costs and any additional expenses incurred for personal preference or convenience (e.g. seat upgrades).
4. *Prior Authorization.* Securing prior authorization for travel (see [BPPM 95.05](#)).

5. *Submit TEV.* Preparing the Travel Expense Voucher and attaching appropriate receipts and documentation as required by [BPPM 95.20](#) and no later than the 10th of the month after the conclusion of travel.
6. *Prompt Return.* Returning as promptly as possible to either the official station or official residence when the state business is completed.

Special Considerations for Study Tour and Field Trip Travel:

- Lead faculty/staff member submits a pre-travel request on behalf of the course involved with study tour/field trip travel. Pre-travel requests must be submitted no later than 6 weeks prior to the trip – and as early as 6 months prior to the trip, depending upon extent of logistics that need to be coordinated. Travel request must include the following:
 - Name of Travelers (a class roster is acceptable)
 - Purpose of the Trip
 - Travel Destination
 - Dates of Travel
 - Budget and Project being charged
- Faculty leaders are responsible for researching flights, hotels, transportation, meals (if included), and admission passes or tour fees. Staff are available to facilitate purchasing and contracts, and should be consulted in advance for information regarding contracts (i.e. for hotels or bus charters) and university resources and policies related to travel.
- Motor Pool Reservations: Include the names of all drivers, vehicle pickup and drop off time, and the contact info for the drivers (email and cell #).
 - The motor pool has vehicles ranging in size from compact cars to 8-passenger vans.
 - To drive a motor pool vehicle one must be 18 years of age and possess a valid driver's license. (Note: To drive the 8-passenger van, a special training is needed and is only offered on the first Thursday of every month.)
 - Motor Pool closes at 5:00pm (earlier in the summer) and all vehicles have to be picked up prior to close, but can be returned after hours. The best practice is to pick up your vehicle between 3-5pm the day prior to travel (if you have an early start). You will not be charged until you actually begin your travel.
- Faculty leader (and any other faculty/staff involved with travel) must submit a TEW and all required receipts no later than the 10th of the month after the conclusion of travel.
- Reimbursements to students for expenses on study tours/field trips should be discussed with administrative staff prior to the trip. Students will be held to the same standard regarding reimbursements (e.g. required receipts should be turned in no later than the 10th of the month after the conclusion of travel).
- Special course fees may be used to cover expenditures related to travel, including the cost of contractual services in connection with transportation (flights, charter buses, motor pool); accommodations (hotels, hostels); and other expenses necessitated by travel. The course fee must cover all projected expenses for students and faculty/staff involved in the travel unless otherwise stated. Students are typically responsible for all meals and personal incidentals; faculty/staff may be reimbursed per diem for travel city. It is expected that students, faculty, and staff will stay at the same accommodations and participate in group transportation for duration of the travel. Any exceptions must be approved by the program head and/or director (depending on the course under which travel is occurring).