

## **6.5 Travel Guide**

Official travel requires prior approval by an appropriate administrator and is subject to General Travel Policies of the university ([BPPM 95.01](#)).

### **Authorizations**

1. Traveler submits Pre-Travel Request Form to administrative assistant.<sup>1</sup>
2. Administrative assistant reviews request for funding approval and assigns TA number from TA log.
3. Administrative assistant types the Travel Authority into the form and gives it to the director to sign.
4. Per information provided on the Pre-Travel Request Form, the administrative assistant will:
  - a. Submit conference registrations using purchasing card or via a TA to Travel Services if a check is needed. (Faculty can pay for their own registration and seek reimbursement on the travel expense voucher with a receipt that shows proof of payment, or check out purchasing card)
  - b. Authorize and arrange airfare on Central Travel Account Airfare (CTA). (Employees can pay for their own airfare and submit a copy of the itinerary for reimbursement on the travel expense voucher. Please be advised that the receipt must show proof of payment.
  - c. Create and authorize motor pool, charter bus, or rental car reservations:
    - i. For motor pool reservations, the names of drivers, including student drivers, vehicle pick up and drop off times, and contact info for drivers must be included in request.
    - ii. The largest motor pool vehicle is an 8-passenger van requiring a special safety course, among other requirements. The safety course is only held the first Thursday of every month, so please plan accordingly. You may sign up on the HRS training website.
    - iii. The motor pool closes at 5pm and is not open on weekends. Vehicle pick-up is only available between 3 and 5 pm for vehicles needed for the weekend or during the evening. Please include the actual time you are picking up the vehicle when you send a request.

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<sup>1</sup> Travel request forms must be submitted no later than 3 weeks prior to your trip—and as early as 6 months prior to your trip— depending upon extent of logistics to be coordinated. The travel request must include name(s) of traveler(s); purpose of trip; travel destination; dates of travel; budget and project being charged. Faculty involved with and/or leading the travel 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 about contacts (hotels or transportation services used in the past, depending upon location) and university resources and policies related to travel.

- iv. All drivers picking up vehicles must have a valid driver's license, be over 18 years of age, and have their signed authority form in hand. Location for pick-up is McCluskey Hall. Pick-up is only available during business hours.
    - d. If the traveler makes his/her own rental car reservation with the WSU contract rate, please be sure to not take out the additional insurance coverage since it is already included in the contract rate. More information is available here: <https://travel.wsu.edu/cars.html>.
    - e. 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 use a privately owned vehicle. Travelers are reimbursed for vehicle miles only. Mileage may be claimed by using maps, highway guides, or actual odometer readings to determine mileage. [Access to the Mileage calculator for traveling within Washington State or anywhere in the United States and Canada.](#)
5. If the CTA was used, administrative assistant logs the purchase in the FY17 Travel Log.
6. Administrative assistant emails the traveler with the TA number and any booking confirmations.
7. Administrative assistant attaches booking confirmations and files the TA in the pink folder.

## Reimbursements

1. Traveler submits a Travel Expense Worksheet to administrative assistant.<sup>2</sup>
  - a. Travel reimbursement requests must be submitted to the administrative assistant no later than the 5<sup>th</sup> of the month after the conclusion of travel. Any requests that are submitted after that timeframe will require a written justification explaining the delay and are subject to approval by the WSU Controller's Office.
  - b. Travel reimbursement requests that are not attached to pre-approved travel are also subject to approval by the director and/or program heads (depending upon funding source).
8. Administrative assistant reviews the submission and ensures all proper receipts have been submitted and information is complete.
9. Administrative assistant enters the information into the TEV form online and electronically routes it to the traveler to approve through the electronic forms system.
10. Traveler electronically signs the TEV and returns it electronically.
11. Administrative assistant routes the form to the director to sign electronically.
12. The director signs the form and routes it back to administrative assistant for final approval.

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<sup>2</sup> All employees must exercise 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. Employees will be responsible for paying any excess costs and any additional expenses incurred for personal preference or convenience.

**Other considerations**

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

- **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?
- **Advantageous:** Administrators and travelers are to select the travel alternative that is most advantageous to the state. An agency may use this advantageous criterion only in the following situations:
  - To ensure the health and safety of agency travelers
  - To comply with the Americans with Disabilities Act
  - To process approval for meals with meetings
  - To authorize the use of privately owned motor vehicles
  - The personal travel plans of the traveler are not to influence this criterion.

*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.

*Limit numbers.* The number of sponsored travelers attending a meeting should be the minimum necessary, consistent with the benefit to WSU.

**Special Considerations for Study Tour and Field Trip Travel**

1. Lead faculty member(s) submit a Pre-Travel Request Form to administrative assistant on behalf of course involving study tour/field trip travel.
2. Travel request forms must be submitted no later than 3 weeks prior to trip—and as early as 6 months prior to the trip, depending upon extent of logistics to be coordinated. Travel request must include:
  - a. Name(s) of traveler(s);
  - b. Purpose of trip, travel destination, and dates of travel;
  - c. Budget and project being charged.
3. Lead faculty member(s) 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 about contacts (hotels or transportation services used in the past, depending upon location) and university resources and policies related to travel.
4. Faculty leader (and any other faculty/staff involved with travel) must submit a Travel Expense Worksheet and all required receipts no later than the 5th of the month after the conclusion of travel. Any requests that are submitted after that timeframe will require a written justification explaining the delay and are subject to approval by the WSU Controller's Office.

### **Use of Course Fees**

Special course fees may be used to cover expenditures related to travel including:

1. The cost of contractual services in connection with carrying persons from place to place (e.g. flights, charter buses, motor pool);
2. Furnishing of accommodations incident to actual travel (e.g. hotels, hostels, or other lodging);
3. 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 associated with travel; faculty/staff may be reimbursed up to appropriate per diem levels for travel city.

For ease of reservations and payments, and with respect to liability, it is expected that students, faculty, and staff will stay at the same accommodations and will participate in group transportation for duration of the travel. Any exceptions must be approved by the program head and/or director (depending upon course under which travel is occurring). Additional information is available in the Course Fee Expenditure Guide (8.2).