



WASHINGTON STATE
UNIVERSITY

Travel Training


For Students & Staff


Travel Process

- **Prior approval is required** for ALL official University travel outside the State of Washington for the traveler to be eligible:
 - *To travel on behalf of WSU.*
 - *To receive reimbursement for allowable expenses.*
 - *For employees this is required to be covered under WSU's worker's compensation insurance while in travel status.*
- **Students:**
 - *A Spend Authorization is created by the department to approve student travel – for both in and out of Washington State.*
- **Staff:**
 - *Travelers with an employee position (applies to Graduate Assistants) in Workday create their own Spend Authorizations in Workday for out of state travel.*
 - *For full-time staff: In state travel can be verbally approved if travel is not third party funded and if exceptions to policy are not requested.*

Travel Approval

- **Students (includes students on stipends):**
 - Complete a Travel Request
 - Program funding, estimated expenses, and advisor signature **required**.
- **The department uses this information to:**
 - Create External Committee Member (ECM) accounts for student travelers.
 - Submit spend authorizations (travel approvals) in Workday.
- **ECM accounts house student information such as legal name, WSU ID #, WSU email, mailing address, and travel direct deposit information in Workday.**
 - Travel reimbursement direct deposit is separate from payroll direct deposit.
 - Default reimbursement payment method is mailed check.
 - Student travelers can set up a time with the department to get set up for travel reimbursement direct deposit if preferred.
- **Travel arrangements can be made once the spend authorization is approved in Workday.**
- **Travelers with an employee position in Workday (includes Graduate Assistants):**
 - Will create their own spend authorizations & manage travel direct deposit in Workday.
 - A Travel Request is NOT required for our department employees.





WASHINGTON STATE UNIVERSITY

Student Engagement Services
ASWSU | CCE | CSOL | GPSA | SEB | Student Media

Travel Request

DEADLINE to submit form: 4 Weeks Prior to Travel Event
Allow for more time if airfare needs purchased

Request Date: _____ Requested By: _____

Program/Gift Account #:

Spend Authorization Request:
Please list legal name of traveler and include preferred name in parentheses.

Traveler Name: _____	WSU ID #: _____	Status: Select Status ▾
Traveler Name: _____	WSU ID #: _____	Status: Select Status ▾
Traveler Name: _____	WSU ID #: _____	Status: Select Status ▾
Traveler Name: _____	WSU ID #: _____	Status: Select Status ▾

List attached for additional travelers

Departure Date & Time: _____ Return Date & Time: _____ Destination: _____

Event & Business Purpose: _____
(What is your role at the event?)

Travel Expense Estimates

Airfare Estimate: _____ Attach preferred flight itinerary for review.
Include traveler's legal name, gender, date of birth as it appears on traveler's government issued ID.

Conference Registration Cost: _____ Registration Deadline: _____ Lodging Estimate: _____
Fill out lodging request form

Meals: Please write the location (city & state) of your estimated meals. Write "included" for meals provided by the conference.
See below link (per diem section) for meals eligible for reimbursement and per diem amounts:
<https://factspay.wsu.edu/welcome-to-travel-reimbursable-services/>

Date of Meal:	Breakfast Location:	Lunch Location:	Dinner Location:

Total Meals Estimate: _____

Personal Mileage: _____ Mileage Estimate: \$0.00 per mile Motor Pool Estimate: _____
List total mileage List traveler name, date, & time Fill out Motor Pool Request form

If travel will include personal time: _____

Personal Expense Estimate: _____ Travelers are responsible for all expenses during personal time.

Other Expenses: _____ (Parking, Uber/taxi, checked baggage, etc.)

Description:	Cost:

Estimated Total Expenses: _____ \$0.00

Approval	Print/Type Name	Signature	Date
Associate Director (for SES, SEB, ASWSU, GPSA, & CCE Travel): Director (for Student Media travel):			

Complete this form and submit to getinvolved.finance@wsu.edu

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Travel Arrangements

- **Airfare:**

- Submit a preferred flight itinerary screenshot with the Travel Request form.
- Screenshot should include:
 - *Flight #'s, flight dates, flight times, departure location, return location, & total price.*
 - **Also needed from Traveler's Government Issued ID:**
 - ***Full name, gender, & birthday (month/day/year).***
- Flights should be booked with one airline carrier (Alaska, Delta, United, American & Southwest Airlines, etc.)
- Third party sites like Expedia and Travelocity can be used.
 - ***However, we pay more in convenience fees using third party sites and have less control over flight changes, connections & cancellations.***
- Google Maps should not be used for your flight itinerary – we are not able to book via Google Maps. This requires our team to book various flights with numerous airline carriers, and we cannot guarantee all flights are available at time of booking.
- ****Real ID Compliance – Anyone traveling by airplane must use a REAL ID-compliant document ** See below link for requirements ****
- <https://dol.wa.gov/id-cards/real-id>



Travel Arrangements

- **Conference Registration:**

- Travelers are responsible for indicating registration deadline on Travel Request.
- Travel approvals take time – ***allow 4 weeks minimum for processing.***
- Once Spend Authorizations are approved student & employee travelers will:
 - *Submit a Purchase Request for the conference registration to Finance Team email.*
 - *Student travelers work with their Advisor to register for the conference and pay for the conference registration with the Pcard.*
 - *Employees will complete their conference registrations and check out the Pcard to pay for it.*
 - **Reason Why:** *conference registrations ask specific questions the traveler knows that Finance Team may not (dietary restrictions, attendance for specific workshops, etc.)*
- Email itemized registration receipt to Finance Team at getinvolved.finance@wsu.edu

Travel Arrangements

• Student & Performer Lodging:

- Complete Hotel/Lodging Request Form.
- Travelers should be calling lodging facilities **prior** to filling out the form to confirm lodging rates and availability.

• Student Employee Lodging requires a Pcard Exception.

- Finance Team submits this once Hotel/Lodging Request is received.
- Once exception is approved lodging can be booked by Finance Team.
- **Pcard can pay for room rate and taxes ONLY.**
- Students must put down a personal card for the hotel incidental hold (varies by hotel) and pay for any parking – parking is a reimbursable expense.

• Lodging Requirements:


- Most hotels require main guest on reservation to be 21 years of age – if travelers are under 21, they should have a fellow traveler who is 21 or over be the main name on the reservation


• Lodging per diem rates apply:

- <https://www.gsa.gov/travel/plan-book/per-diem-rates>

• Full-time staff:

- Reserve & pay for their own lodging.
- Lodging reimbursement requested after travel occurs – itemized receipt required with balance due of \$0
- Incidentals included in lodging are **NOT** reimbursable





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**Hotel/Lodging
Request**

DEADLINE to submit form: *At least 72 Hours Prior to Travel Event*
Allow for more time for group travel reservation requests.

Program/Gift Account #:

Requester's Name:	Date(s) of Event:	Today's Date:
Name of Event/Program:	Email:	Phone:

Hotel Name:	Conference Hotel <input type="checkbox"/>
Address/City/State/Zip:	
Hotel Phone #:	Hotel Rep: <input type="text"/>
Group Rate Code: <input type="text"/>	

Please call hotel PRIOR to submitting form to confirm rates & availability. Ask your advisor!

Guest Name(s)	(If more than 10 rooms, please attach an additional form or a full list)	Check In Date	Check Out Date	# Nights	Room Type	# People
Room #1:					Be ▾	
Room #2:					Be ▾	
Room #3:					Be ▾	
Room #4:					Be ▾	
Room #5:					Be ▾	
Room #6:					Be ▾	
Room #7:					Be ▾	
Room #8:					Be ▾	
Room #9:					Be ▾	
Room #10:					Be ▾	

Special Room Requests (disability accessible, rollaway bed, etc. – include Room #(s) from above):

Payment Method: Direct Bill room and tax only to WSU. ALL incidentals **MUST** be paid by guest(s) (meals, phone calls, internet, etc.).
 Other:

Full-time staff will arrange and pay for their lodging and request reimbursement. If lodging request is for student employees or a speaker who is a WSU employee, a Pcard exception is needed. Please check in with Chloe Campbell on this process.

Reservation Confirmation: Please email confirmation(s) to:

Lodging Per Diem Rates:
<https://www.gsa.gov/travel/plan-book/per-diem-rates>

	Estimated \$
\$ Cost Subtotal	
Taxes (Pullman = 7.9%)	
TOTAL <input type="checkbox"/> Not to exceed	

Signature of Requester:

Signature Account Authority/Advisor:

Signature of Associate Director (If purchase is over \$2000):

Complete this form and submit to the Finance Team at getinvolved.finance@wsu.edu

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Travel Arrangements

- **Lodging Continued**

- If lodging rate is over per diem – Finance Team will see if a lodging exception applies. Please see below link for lodging exceptions.
 - <https://acctspay.wsu.edu/lodging-general-info/>
 - If lodging exceeds maximum lodging ceiling; Travel department will need to provide additional approval before lodging is booked.

- ***Fifty Mile Rule:***

- *WSU will not fund lodging expenses incurred at a lodging facility located within fifty miles of the traveler's official workstation or official residence. Unless an exception applies – see below.*

- ***Exceptions include:***

- *The stay eliminates travel back and forth late night or early morning.*
- *The stay is due to health and safety concerns.*
- *When approving administrator determines that staying over night is more economical than returning to official workstation or residence.*
- *All exceptions above require additional justification and approval **before** lodging is booked.*

Lodging - Airbnb

Airbnb is an APPROVED lodging vendor

Lodging must be booked in traveler's online Airbnb account for risk management purposes AFTER travel approvals are in place

Pcard Exception approval still required BEFORE lodging is booked

Travelers will work with Advisor to book lodging after Finance Team confirms travel is approved

Motor Pool

- **Submit Motor Pool Request Form**

- Advisor signature required.
- 7 passenger vans are the biggest vehicle type that a student can drive without additional training and requirements.


- **All Driver Requirements:**


- Must be at least 18 years of age (21 years of age if driving a van).
- Have a valid drivers license and at least two years of driving experience.
- Possess any insurance as required.
- **Must complete the below:**
 - Motor Pool Guidelines Form
 - Student Driver Authorization
 - Driver Safety Training

- **See separate Motor Pool Training for completing these requirements.**

- **A WSU driver may transport individuals who are traveling on official University business.**

- Cannot provide rides for any nonofficial passengers, including family members, relatives, friends, and pets.
- Students are NOT allowed to transport any non-college enrolled high school or younger children.





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Motor Pool Request

DEADLINE to submit form: *At least 72 hours for processing*
Allow for more time for multiple reservations.

Program/Gift Account #:

Request Date: Requested By:

Event & Business Purpose:

Vehicle Type #1: (Select specific vehicle make and model from drop-down list)

Pick-Up Date:

Return Date:

of Travelers:

Pick-Up Time: AM PM

Return Time: AM PM

Destination: (City, State)

Check this box if destination, pickup, and return information is the same for all reservations.
Visit <https://facilities.wsu.edu/motor-pool-rates/> for Motor Pool rates & vehicle types.

Vehicle Type #2: (Select specific vehicle make and model from drop-down list)

Pick-Up Date:

Return Date:

of Travelers:

Pick-Up Time: AM PM

Return Time: AM PM

Destination: (City, State)

Vehicle Type #3: (Select specific vehicle make and model from drop-down list)

Pick-Up Date:

Return Date:

of Travelers:

Pick-Up Time: AM PM

Return Time: AM PM

Destination: (City, State)

Vehicle Type #4: (Select specific vehicle make and model from drop-down list)

Pick-Up Date:

Return Date:

of Travelers:

Pick-Up Time: AM PM

Return Time: AM PM

Destination: (City, State)

Driver(s) to Pick-Up:

Alternate Driver(s):


Motor Pool Total Cost Estimate:


Approval	Print/Type Name	Signature	Date
Advisor/Coordinator/Supervisor <small>(If Advisor/Coordinator/Supervisor is the driver, then Associate Director/Director/Executive Director)</small>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

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Reimbursement

- **Students submit Reimbursement Request with:**
 - Itemized meal receipts – alcohol if purchased must be on a separate receipt and is **NOT** reimbursable.
 - Itemized miscellaneous expense receipts (parking, checked bag fees, ground transportation).
 - Ground Transportation (Uber/Lyft/Taxi) – business purpose is also required (example: travel from airport to hotel).
 - **** Email all forms and receipts to getinvolved.finance@wsu.edu ****
- **Employees (includes Graduate Assistants):**
 - Create their own Expense Reports in Workday.
 - Receipts required for miscellaneous expenses and lodging.
- **Allowable and Non-Allowable Expenses:**
 - <https://acctspay.wsu.edu/welcome-to-travel-reimbursable-services/>
- Travel expenses must be reimbursed within 60 days of the travel end date to avoid the travel expenses being taxable through payroll.





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**Reimbursement
Request**
(Expense Report)

DEADLINE to submit form: *Immediately after travel event*
Travel expense reimbursements processed after 60 days of the travel end date are taxable through payroll.
 Policy link: <https://travel.wsu.edu/policy-revisions/>

Program/Gift
Account #:

Request Date: _____ Requested By: _____

Expense Report Information:
Please list legal name of traveler and include preferred name in parentheses.

Traveler Name: _____

Mailing Address: _____

Trip Start Date: _____

Trip End Date: _____

Trip Origin: _____

WSU ID #: _____

City, State, Zip: _____

Trip Start Time: _____

Trip End Time: _____

Trip Destination: _____

Expense Lines (Total Cost):

Airfare Total Cost: _____ If self-purchased

Lodging Total Cost: _____ Fill in daily lodging rates below

Lodging Justification (if over per diem) _____

Meal Locations & Daily Lodging Rate:
Fill in city and state for meals (meals reimbursed at per diem for lodging location); single day trips reimbursed at event location per diem.

For meals eligible for reimbursement and per diem amounts go to per diem section at: <https://acctspay.wsu.edu/welcome-to-travel-reimbursable-services/>

Date:	Breakfast Location:	Lunch Location:	Dinner Location:	Lodging Amount:

Alcohol is not reimbursable (get a separate receipt)
(including the use and gratuity for alcohol)

Mileage: _____ Enter total miles driven

Miscellaneous Expenses Total Cost: _____ Fill in miscellaneous expenses below

<u>Business Name/Vendor</u>	<u>Purpose of Expense</u>	<u>Amount</u>

Personal Time Duration (if applicable): _____

Additional Trip Information:

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Reimbursement

- **Meals:**

- **Students** are reimbursed actual cost of meals up to per diem.
- Receipts are **required** for student meal reimbursement.
- **Staff** are reimbursed at per diem. Receipts not required but recommended the traveler keeps the receipts until reimbursement is finalized.

- **Defined meal period policy:**

- <https://acctspay.wsu.edu/welcome-to-travel-reimbursable-services/>
- Shows what meals are eligible for reimbursement for your travel start and end days based on official travel start and end time.

- **Students can be reimbursed at per diem for meals IF:**

- Traveler's Advisor approves.
- **NOTE:** It is preferred to reimburse students actual cost of meals up to per diem, since travel reimbursements can impact a student's financial aid .

- **Per diem reimbursement for meals is based on the location of where the traveler lodges see below for per diem rates:**

- <https://www.gsa.gov/travel/plan-book/per-diem-rates>

- **Single day trips:**

- Traveler must be in travel status for at least 11 hours for meal reimbursement.
- Per diem rate is the location of the single day trip.
- Single day trip meals are taxable through payroll .

Enters Travel Status	Meal(s) Reimbursed that Day
Before 8:00 a.m.	Breakfast, Lunch, Dinner
After 8:00 a.m. and before 2:00 p.m.	Lunch, Dinner
After 2:00 p.m. and before 6:00 p.m.	Dinner

Ends Travel Status	Meal(s) Reimbursed that Day
After 6:00 a.m. and before 12:00 p.m.	Breakfast
After 12:00 p.m. and before 6:00 p.m.	Breakfast, Lunch
After 6:00 p.m.	Breakfast, Lunch, Dinner
In Travel Status for the Entire Day	Breakfast, Lunch, Dinner

Meal Per Diem Rates

Breakfast	19.00	20.00	22.00	24.00	17.00
Lunch	22.00	24.00	25.00	27.00	20.00
Dinner	33.00	36.00	39.00	41.00	31.00
Total (Daily Meal Rate)	74.00	80.00	86.00	92.00	68.00

Resources

- **What can I do if I lost my travel receipts?**
 - Complete an Affidavit of Lost Receipt:
 - https://policies.wsu.edu/prf/login/?redirect_to=/prf/documents/2017/10/9/5-20-receipt-affidavit.pdf
- **For Employees - Create Spend Authorization Guide:**
 - <https://confluence.esg.wsu.edu/spaces/WKB/pages/156963485/Create+Approve+Change+or+Close+a+Spend+Authorization>
- **For Employees - Create Expense Report Guide:**
 - <https://confluence.esg.wsu.edu/spaces/WKB/pages/156963308/Create+Approve+Change+or+Cancel+an+Expense+Report>
- **See Travel FAQ at below link:**
 - <https://acctspay.wsu.edu/welcome-to-travel-reimbursable-services/>

Questions?

WSU

