

FAQs

Foundation Travel

For Additional Questions, Please Reach Out To:

[Becky Martinez](#) Accounting Analyst (Travel)

Foundation Travel Key Points

1. No travel expense reimbursement shall be paid unless the employee has submitted an approved Travel Claim.
 2. Claims shall be submitted for reimbursement within 30 calendar days from the date of travel and shall include the following (claims submitted beyond 30 days may not be reimbursed without justification from the employee's supervisor):
 - a. Expenses are properly itemized, accompanied by the necessary original invoices/receipts, and approved by the employee's supervisor or authorized account signer.
 - b. The signature of the account signer is responsible for ensuring funding availability, appropriateness of travel, demonstrable benefit to the auxiliary and/or University, and for ensuring completeness of supporting expense documentation including a copy of the published agenda for attendance at any conferences/meetings.
 - c. To be eligible to receive reimbursement of mileage expenses or use of a rental car, the employee (driver) must have a valid California Driver's License and shall have completed the [University's Defensive Driving Certification program](#).
 - d. If travel expenses are to be reimbursed by a sponsored program (grant/contract), any restrictions contained in that agreement or the Grantor's policies supersede this policy. In absence of policies from the Grantor, this policy will apply to all sponsored program travel.
 3. Any Travel Claims to be reimbursed by Academic Affairs cost center (30001) must be submitted to the Academic Resource Office (ARO) for appropriate approval prior to submitting to Foundation.
 4. Group meals are to be reimbursed through a Payment Authorization, not a Travel Claim.
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FAQs:

1) What Should I include with my Travel Claim?

- Agenda, itinerary, conference program, or any documentation supporting the business purpose and travel dates.
- Brief description of business purpose of the trip in the "Purpose of Travel" section
 - i) Name of conference or meeting
- Travel dates outlined in "Itemized Expenditures" section on Travel Claim
- Per diem meals and incidentals (**Per diem page or screenshot must be included**)
 - ii) Per diem page from [GSA website](#)(or corresponding site for per diem rates if travel outside of U.S) with corresponding rates for the trip location
 - iii) Meal(s) provided by event; please deduct accordingly
*Reminder: Travelers are eligible for 75% of the total per diem rate on the first and last day of travel (departing day and returning day)
- Transportation
 - iv) If claiming mileage reimbursement, include map showing the mileage claimed
 - v) If claiming airfare, include receipt of flight(s) with confirmed payment
 - vi) If claiming car rental reimbursement, include final receipt with total payment
 - (1) Include fuel receipts for fuel reimbursement
 - vii) Include any other transportation expense receipts such as:
 - (1) Parking/Tolls
 - (2) Taxi, shuttle, Uber/Lyft
- Lodging final folio
 - viii) Should show the breakdown of the stay duration
 - ix) No room upgrades are reimbursable
 - x) Any food charges made to the room will be deducted; this should be included in the M&IE per diem rate
- Conference registration and/or corresponding membership receipt with payment confirmation

- 2) **What if I incurred expenses in foreign currency during my foreign travel?**
 - a) Receipts in foreign currency must be accompanied with a Foreign Travel Exchange Rate conversion table for the date on which the goods or services were received. This can be obtained from <http://www.oanda.com/>.
- 3) **What if I obtained a Travel Advance?**
 - a) If a Travel Advance has been received, said amount must be noted on the Travel Claim form and must be deducted from the total amount of reimbursement.
- 4) **What if a group leader covers the group's expenses?**
 - a) In rare and pre-approved situations where one employee is paying for the travel expenses (i.e. hotel costs, conference fees, etc.) for other employees, the documentation must provide proof of payment for each individual employee. Subsistence (per diem) will be paid to each employee individually and not to their supervisor or other auxiliary employees.
- 5) **What if I lost my receipt?**
 - a) When receipts cannot be obtained or have been lost, a "[Missing Receipt Affidavit](#)" must be included with the Travel Expense Claim explaining why a receipt is not available and description of expenses. In the absence of satisfactory explanation of the amount involved, the expense shall not be allowed.
- 6) **What if I incur meal expenses during my trip?**
 - a) Meals and incidental expenses incurred during travel to conduct official University or Auxiliary business are reimbursable as a per diem allowance. Travelers are eligible for 75% of the total per diem rate on the first and last day of travel. Expenses above the per diem rate will not be paid and are the responsibility of the traveler.
 - i) For **Continental US travel**, rates set annually by [General Services Administration](#)
 - ii) For **Alaska, Hawaii, or the US Possessions travel**, rates annually set by [Department of Defense \(Per Diem, Travel and Transportation Allowance Committee \(PDTATAC\)\)](#)
 - iii) For **International travel**, rates set monthly by [Department of State](#)
 - iv) **If a meal is provided, the daily per diem amount must be reduced by the applicable meal amounts for the meal provided.**
- 7) **Is there a maximum rate for lodging?**
 - a) The nightly lodging rate for domestic travel based on actual expenses incurred
 - b) may not exceed \$333 per night, excluding taxes and other related charges.
 - i) A traveler who attends an approved conference where the prearranged conference lodging rate exceeds the \$333 per night limit may stay at the conference hotel without additional approval.
- 8) **Is my flight seat upgrade reimbursable?**
 - a) Employees will not be reimbursed for any seat upgrade fee or for any additional fees beyond coach class or the lowest available Economy airfare rate
 - b) Per recently revised [CSU Travel Policy](#), standard seats selection fees are eligible for reimbursement **provided they don't change the class of service from standard economy to a premium class.** **Examples of non-reimbursable seat purchases that change class of service are:**
 - i) Premium economy class upgrades
 - ii) First class or business class upgrades
 - iii) Extra legroom seats (marketed as 'Economy Plus,' 'Comfort+,' etc.)

Resources:

Foundation Travel Policy: <https://auxiliary.fresnostate.edu/foundation/documents/policies/aux-travel-policy.pdf>

Foundation Travel Expense Claim: <https://auxiliary.fresnostate.edu/foundation/documents/forms/fdn-travel-expense-claim.pdf>

Foundation Travel Approval:

<https://auxiliary.fresnostate.edu/foundation/documents/forms/Travel%20Approval%20Form%202018.10.18.pdf>

M&IE Per Diem Rates:

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

Alaska, Hawaii, or US Possessions: <https://www.travel.dod.mil/Travel-Transportation-Rates/Per-Diem/Per-Diem-Rate-Lookup/>

International: https://allowances.state.gov/web920/per_diem.asp

M&IE Breakdown: <https://www.gsa.gov/travel/plan-a-trip/per-diem-rates/mie-breakdowns>

Payment Authorization:

<https://auxiliary.fresnostate.edu/foundation/documents/forms/Payment%20Authorization%202022.03.14.pdf>

Missing Receipt Affidavit: <https://auxiliary.fresnostate.edu/foundation/documents/forms/missing-receipt-affidavit.pdf>

CSU Travel Policy: <https://calstate.policystat.com/policy/18816903/latest/#autoid-vxzg3>