ASSOCIATED STUDENTS, INC.
CAL STATE SAN MARCOS

POLICY:	**ASI TRAVEL POLICY**
EFFECTIVE DATE:	**MARCH 23, 2001**
REVISED DATE:	**JUNE 28, 2024**
APPROVAL DATE:	**March 5, 2025**

DEFINITIONS

Domestic Travel:
Travel within the United States. This includes Alaska and Hawaii.

Group Travel:
One ASI staff or student employee is the lead (paying for travel expenses), and the other traveler(s) are employees, participating in the travel without incurring expenses. This type of travel includes programmatic travel like Alternative Spring Break, CSUnity, CHESS, etc...

Non-Employee:
Prospective employees, consultants, and students who are traveling on ASI business.

Participants:
ASI staff, student employees, or other traveler(s) are employees participating in the travel without incurring expenses.

PURPOSE

To establish policy for Associated Students, Inc. of California State University San Marcos (herein called ASI) staff and student travel funded by ASI that support the mission of ASI and ensure proper stewardship of the allocated funds.

POLICY

I. ASI supports travel that includes conferences, seminars, workshops, retreats, training, and meetings which enhance the growth of the organization, staff and/or student, and ASI.
II. ASI will, in most cases, pay for transportation, lodging, registration, per diem and miscellaneous expenses.
III. Approvals for travel include:
    1. Domestic Travel approvals: require the signature of the traveler's supervisor and ASI Executive Director.
    2. Out-of-state travel approvals requires the signature of the traveler's supervisor, ASI Executive Director and CSUSM Vice President for Student Affairs.
    3. International travel approvals: require the signature of the traveler's supervisor, ASI Executive Director, CSUSM Vice President for Student Affairs and CSUSM President.

IV. ASI categorized travel into the following four types:
1. Individual Staff Travel
2. Individual Student Employee, elected official, or representative Travel
3. Group/Programmatic Travel
4. Non-Employee Travel

V. Approval Guidelines
1. Supervisor and/or Funding Authority ensure all expenses are authorized, necessary, and supported by an ASI business/program purpose.
2. Make certain that the expenses incurred are necessary for the purpose of the trip. The traveler is responsible for any excess costs or additional expenses incurred for personal preference or convenience.
3. For staff, conduct yourself in a manner that is in accordance with the CSUSM Corporation Employee Handbook and for students the CSUSM Student Code of Conduct

VI. Transportation
1. Air Travel
   a. Coach or Economy Class – Coach or economy-class fare shall be used whenever ticketing restrictions are reasonable.
   b. Baggage and Seat Selection Fees – Checked baggage fees or seat selection fees (for coach or economy-class fares) are an allowable expense so long as they are considered reasonable and necessary for the business purpose and length of the trip.
   c. You *will not be reimbursed for any additional insurance. Exceptions can be made with the approval of the ASI Executive Director.*
2. Vehicle (Personal or Rental)
   a. Drivers must possess a valid driver's license and must be Defensive Driving certified.
   b. When driving instead of flying, the traveler will be reimbursed for the lesser of the two expenses. Per the CSU Travel policy, travelers must use the rental agencies that the University has negotiated contracts that include insurance. These include Enterprise and national rental agencies.
   c. Drivers are responsible for carrying and maintaining auto insurance.
   d. The automobile mileage rate is determined by the CSU Travel policy rate for reimbursement. Proper mileage documentation must accompany the Travel Expense Claim Form. When two or more employees share a private vehicle, only the driver may claim reimbursement for mileage.
   e. During Working Hours: Reimbursement shall be made between the traveler's residence and the destination, or the work location and the destination, whichever is less. Exceptions can be made with the approval of the ASI Executive Director.
   f. During non-working hours: Reimbursement shall be made between the traveler's residence and the destination.

VII. Lodging
1. Lodging expenses are covered only when the conference is for multiple days and further than 25 miles from their work location or home, whichever is closer. Exceptions must be requested in writing and may only be granted by the ASI Executive Director.
2. The hotel rate is determined by the CSU Travel policy. The current rate nightly lodging rate for domestic travel is $333 per night. Please refer to the CSU Travel policy for the current rates.

VIII. Meals

1. Meals not provided by the event and meet the criteria below are paid using per per diem if requested. Per the CSU Travel policy, per diem rates are based on the location of travel.
2. Breakfast: May be requested only if travel begins before 7:00 AM on the departure date, is not provided by the conference or ends past 9 AM on the return date.
    a. Lunch: May be claimed for travel that begins before 11 AM on the departure date, is not provided or ends past I PM on the return date.
    b. Dinner: May be claimed when travel begins before 4 PM on the departure date or ends past 6 PM on the return date.
    c. Incidental expenses are allowed after the first 24 hours and for every full 24-hour period thereafter.
    d. Automobile mileage reimbursement is determined by the CSU travel policy rate.

PROCEDURE

II. Pre - Travel

1. The request for travel form is used to authorize any business-related travel and/or travel advances on behalf of ASI or the University. A travel request form is required for every traveler.
2. All travel must be pre-approved either before the payment of any travel-related expenses, or 10 days prior to travel, whichever comes first.
3. Approval prior to travel must include a completed Request for Travel Form estimate with all required signatures. The funding account, fund, department, and total estimate must be indicated.
4. For student travel, the following forms must be completed: Student Code of Conduct, Release of Liability, Promise not to Sue, Assumption of Risk, and Release and Hold Harmless (if traveling by air). All forms must be included in the travel packet.
5. The request to travel form must be signed prior to travel by the traveler, the traveler's supervisor, the Executive Director, and applicable signatures for the VP of Student Affairs (if traveling out of state) and CSUSM President (if traveling internationally). Signature signifies approval of all estimated expenses.
6. Per Diem, mileage and incidentals are paid by check to the traveler prior to travel for non-procard users. Use per diem rates based on location of travel (link to per diem rates website listed below)

III. During Travel

1. All ASI professional staff and student employees who have an ASI Pro Card must use their card for reimbursable expenses which include excess baggage charge and parking charges not included in a hotel bill.
2. Each traveler must keep all itemized, original receipts for items purchased during travel for reimbursements. For travelers using their ASI Pro Card, all itemized receipts must be included with their monthly procard reconciliation for travel expenses.

IV. Post – Travel

1. Submit Travel Expense Claim Form with proper documentation to the appropriate approving authorities for signatures.
    a. If there is no reimbursement being requested for travel expenses, then no travel claim form is needed.
    b. For ASI ProCard holders, a claim form must be completed to show what expenses were incurred on the procard even if there is no reimbursement to the traveler.
2. All post travel documentation is due to the ASI Front Desk within 5 business days upon return.
3. Back up documentation is required in the form of original itemized receipts for all expenses incurred while traveling except for cash advance items (meals, miscellaneous and mileage).
4. An ASI Expenditure Request Form must be completed for reimbursements accompany receipt(s) after the travel, if applicable.
5. Per CSU Travel policy, itemized receipts for expenses must be submitted with the travel claim form. If a receipt of any amount is missing and a duplicate cannot be obtained, the traveler is to:
    a) complete a lack of itemized receipt, supervisor will sign form along with traveler and include in travel packet.
6. The traveler is personally responsible for any excess costs or additional expenses incurred for personal preference or convenience.

RELATED DOCUMENTS

I. ASI Expenditure Request Form
https://adobesigndynamicworkflow.csusm.edu/asi

II. Lack of Itemized Receipt Form
https://www.csusm.edu/asi/documents/forms/appendix_iii_lack_of_itemized_receipt_form_fillable.pdf

III. ASI Pre-Travel / Travel Claim Form
https://adobesigndynamicworkflow.csusm.edu/asi

IV. ASI Per Diem Worksheet
https://www.csusm.edu/asi/documents/forms/asi_travel_per_diem_worksheet.pdf
Per Diem Rates for Domestic Travel
https://www.gsa.gov/travel

V. ASI Travel Claim form
https://adobesigndynamicworkflow.csusm.edu/asi

VI. Release and Hold-Harmless Statement
https://www.csusm.edu/asi/documents/forms/asi_travel_release_and_hold-harmless_statement.pdf

VII. Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims
https://www.csusm.edu/asi/documents/forms/asi_travel_release_of_liability.pdf

VIII. Student Conduct Agreement
https://www.csusm.edu/asi/documents/forms/asi_travel_student_conduct_agreement.pdf
CSU Travel Policy
https://calstate.policystat.com/policy/15645082/latest/