Faculty Travel Information/FAQ’s

FUNDING/NO FUNDING:

If **no funding** from the School or College is involved (i.e. if the trip is entirely self-funded, but is professionally related during the school year), what do I need to do?

*Complete the Travel Requisition form and indicate “self-funded.”*

The Travel Requisition Form is available from the Dean’s Office or online at:
[http://www.potsdam.edu/offices/purchasing/forms](http://www.potsdam.edu/offices/purchasing/forms) (see Travel Forms in the last group at the bottom of the page). This is, in effect, a “permission to travel” form, regardless of how the professional travel is funded, and is needed for a variety of institutional reasons, including liability protection for those traveling on behalf of the institution and our ability to make the case for future additional travel funding. Be aware that listing expenses on a Travel Requisition form does not guarantee approval of funding for those expenses. Funding must be requested and approved as a separate matter by the person(s) with authority to approve funding from particular accounts.

If the trip is **partially or fully funded** by any source/office at the School or College, what is the first step?

*The first step is still the Travel Requisition Form (above).*

Currently the same travel policies apply to all travel funded by SUNY Potsdam sources, whether State accounts or Foundation accounts. These policies are covered on the Purchasing Office’s travel website: [http://www.potsdam.edu/offices/purchasing/travel.cfm](http://www.potsdam.edu/offices/purchasing/travel.cfm). Many questions can be answered there. Call the Purchasing & Payables office if needed (ext. 2143) for additional information. Ms. Margaret Ball in the Dean’s Office is a primary contact at Crane for travel-related forms and questions (ballmw@potsdam.edu, ext. 2812).

**Some general observations:**

**Airfare:** Please verify the proper procedure with Margaret Ball prior to making any airfare purchases. For airfare paid from any State account, airfare must be arranged through the New York State Contract vendor and purchased using the traveler's Citibank Travel Card. **Airfare not purchased through our State contract vendor will NOT be reimbursed to the traveler,** if a State account is intended to be used. For approved Foundation account funding, with rare exceptions, it will be your responsibility to book and pay for air reservations, which will be reimbursed on the basis of your receipt. Electronic receipts are acceptable.

**Auto:** Travel by automobile, when approved for State funding, will generally be through use of a state fleet vehicle, if available. Margaret Ball can work with you to reserve state vehicles. Should a state vehicle not be available, and in certain other circumstances, other forms of automobile transportation may be approved. Consult with Margaret Ball and, as appropriate, with the Purchasing Office. Margaret can also assist with those who have not used state vehicles previously and need campus approval. Automobile travel, when using Professional Development Funds, requires use of a calculator tool provided by the New York State Office of General Services. Please see Margaret Ball for assistance in the use of this calculator.
**Hotel:** Again, consult with Margaret and see Purchasing Office information; key factors are that for travel within New York you must always request tax exempt status and use the tax exempt form available from the Purchasing Office, and your hotel room cost must be within the allowable maximum. See [http://www.gsa.gov/portal/category/100120](http://www.gsa.gov/portal/category/100120) for hotel maximum rates, which vary by location. For out-of-state hotel bookings please consult with Margaret for additional information.

**Meals:** Meals, if approved for funding, must also be covered within state per diem allowances (see the same link for hotel maximums, above). Coverage may vary depending on the nature of the travel and funding approved, whether by receipted meal coverage or by a flat per diem based on the length of travel. Again, consult with Margaret Ball.

**Travel with students:** If you are traveling with students, additional considerations apply. Margaret Ball will supply a form requiring the names of students traveling and details about the trip, and department chairs must be aware of planned student travel (and must sign the relevant form). Please consult with Margaret.

**What do I do after travel is complete?**

Promptly complete a Travel Expense Claim Form (Travel Voucher) (available on the Purchasing & Payables form page: [http://www.potsdam.edu/offices/purchasing/forms](http://www.potsdam.edu/offices/purchasing/forms)) and submit it along with clearly organized, dated and labeled receipts and, if applicable, mileage statements, for all expenses where reimbursement is expected. Submit this material to Margaret in the Dean’s Office and it will be checked for completeness, then forwarded for approval to the Purchasing & Payables Office.

From state accounts, reimbursements are made by the state comptroller’s office approximately 3 weeks after submission. If you receive your paycheck via direct deposit, you will also be reimbursed via direct deposit to the same account as your paycheck. If you receive a paper paycheck, you will also be reimbursed via a paper check, mailed directly from Albany to your home address.

From Foundation accounts, reimbursements are made by check; these are issued in a weekly cycle, and if requested by the end of a particular week will typically be available for pickup early the following week. You will be notified by the Crane office when you have a Foundation check to pick up in our office.

Any travel made using a state travel card must be documented within five days of the completion of travel. Otherwise, documentation must be submitted no more than ten days after the completion of travel. Later submissions will not be able to be honored.

**A critical general principle:**

Make sure all information, and all required forms (starting with the Travel Requisition) are submitted well in advance of your travel, so that the trip is duly noted and all relevant questions are answered in advance. Generally it is not possible to fund travel that has already taken place without the submission of appropriate forms or other documentation.

**To reiterate principal sources of information:**

Campus Purchasing Office
Ext. 2143
[http://www.potsdam.edu/offices/purchasing/travel.cfm](http://www.potsdam.edu/offices/purchasing/travel.cfm)

Margaret Ball, Dean’s Office
Ext. 2812
ballmw@potsdam.edu