

SUNY Environmental Science & Forestry

Travel Policy Information

[Purpose](https://www.plattsburgh.edu/about/offices-divisions/administration-finance/management-services/campus-handbook/section-vi-finance-budget/travel-policy.html)

* The purpose of this document is to help Travelers understand and apply Research Foundation and Internal Revenue Service travel rules and regulations and provide instructions regarding reimbursement for expenses while in Travel Status or when traveling in proximity of the employee’s home or work location.

[Policy](https://www.plattsburgh.edu/about/offices-divisions/administration-finance/management-services/campus-handbook/section-vi-finance-budget/travel-policy.html)

* Travel must be for Research Foundation Business and authorized in advance of the travel.
* The Research Foundation reserves the right to restrict travel to locations for any reason, including but not limited to, travel bans, concerns about the safety of the destination, or limited funds.
* Travelers should use the most efficient and cost effective method of transportation available, including carpooling when multiple people are traveling for the same purpose.
* The Research Foundation will only reimburse actual, necessary, and reasonable business expenses incurred when an employee is in official Travel Status.
* Submit claims for reimbursement for only actual allowed expenses within reimbursement rate limits; and submit accurate Travel Vouchers upon return from travel, but **no later than 120 days** of the end of travel. Failure to do so could result in the reimbursement being taxed or loss of reimbursement.
* All submitted travel reimbursements should contain original signatures or electronic signatures and receipts. The electronic signature should contain a date/time stamp to be acceptable.
* Travelers are responsible for obtaining and providing receipts necessary to justify travel expenses with the Travel Voucher.
* All Travelers driving vehicles must comply with the expectations outlined in the College’s Fleet Management Policy, including but not limited to receiving the New York State License Event Notification Systems (LENS) Clearance prior to departure, obeying all applicable traffic and vehicle laws while in use, and timely reporting of accidents.
* Travelers must comply with all applicable Research Foundation rules and regulations for travel, including those rules governing reimbursement of expenses.
* Failure to comply with this document may result in non-reimbursement of costs, the Traveler having to reimburse the Research Foundation for unauthorized expenses, restriction or suspension of travel privileges, or discipline in accordance with applicable collective bargaining agreements.

[Definitions](https://www.plattsburgh.edu/about/offices-divisions/administration-finance/management-services/campus-handbook/section-vi-finance-budget/travel-policy.html)

* Non-Employee- Individuals not currently employed by the Research Foundation but undertaking state sponsored or funded travel. Examples of non-employee travel include candidates traveling for interviews, student travel, vendor travel such as lecturers, evaluators, reviewers, registered volunteers, and those receiving honorariums.
* Work Location- The employee’s usual work location as designated by the President or designee. Also known as “Official Station”.
* Traveler- Any Research employee, volunteer, or Non-Employee engaging in travel sponsored or funded by the Research Foundation.
* Travel Authorization- The process of securing necessary approvals before travel.
* Travel Card- A Research-issued credit card exclusively used for Research Foundation employee travel. ***\*\*For RF Travel Card information, see RF Travel Card Policy on Travel website\*\****
* Travel Voucher- A form used by a Traveler to account for travel expenses and to request reimbursement of out-of-pocket expenses.

[Responsibilities](https://www.plattsburgh.edu/about/offices-divisions/administration-finance/management-services/campus-handbook/section-vi-finance-budget/travel-policy.html)

**TRAVELERS**

* Know the Research Foundation’s and the College’s travel rules and regulations.
* Obtain necessary approvals for travel in advance, including method of travel prior to making travel reservations.
* Secure the most economical method of travel in the best interest of the Research Foundation and obtain all necessary supporting documentation or accept the lesser reimbursement, if selecting a method for personal convenience.
* Maintain an accurate record of all expenses, departure and return times, and if taking a personal vehicle mileage, include required receipts or documentation when submitting Travel Vouchers along with mileage log.

**SUPERVISORS**

* Know the Research Foundation’s and the College’s travel rules and regulations;
* Know the Traveler’s Work Location and its effect on the travel reimbursement, including, where applicable, the taxability of reimbursement.
* Authorize travel only when necessary and appropriate;
* Review Travelers' itineraries in advance to ensure the most economical method of travel is used in the best interest of the Research Foundation.
* Verify that expenses are within allowable rates and all required documentation is included and that expenses are actual, necessary and reasonable; and review and approve Travel Vouchers in a complete and timely manner.

[Procedures](https://www.plattsburgh.edu/about/offices-divisions/administration-finance/management-services/campus-handbook/section-vi-finance-budget/travel-policy.html)

**AUTHORIZATION TO TRAVEL**

* All Travelers must complete the Travel Authorization Form detailing the purpose of their trip, the destination, transportation method, and anticipated costs whether they are in overnight status or taking a day trip. This form must be completed before the travel. If multiple travelers are going to the same location, each traveler must complete a travel authorization.
* The completed Travel Authorization Form should be routed to the Traveler’s supervisor for approval.  Supervisors should review the form to ensure that the travel is for legitimate Research Foundation business and, if account owners, review to determine that anticipated expenditures are appropriate and that there is sufficient funds to cover the costs of the travel.
* If the travel is being funded by other units of the College, the form must be approved by an individual authorized to approve expenditures for each account and should be routed accordingly.
* If a division or department requires additional approval, the Travel Authorization Form must be routed to the applicable individual(s).  Travel Authorization Forms are not considered approved until all necessary approvals have been obtained.
* After approval, completed Travel Authorization Form should be routed to the Travel Office a minimum of two weeks prior to the start of the anticipated travel, if possible.

**BLANKET TRAVEL AUTHORIZATIONS**

* In situations where employees are performing repeated, routine travel extending over a period of time, a blanket authorization can be approved. Blanket authorizations are limited to employees performing routine travel as part of their duties (e.g. athletic coaches, student teaching supervisors, and admission recruiters).  In these situations, blanket authorizations can be used to expedite the travel authorization process, however, Travelers and their supervisors are still expected to fulfill their responsibilities by ensuring that all travel conducted is for legitimate Research Foundation business, that costs incurred are appropriate, and all other travel requirements are met.