



TRAVEL POLICIES AND PROCEDURES

There are several steps that student organizations must complete before they can travel. Prior planning is the key to a successful, safe, and enjoyable off-campus excursion.

There are forms that the advisor must complete before *and* after traveling. Student Engagement cannot fill these out for the advisor; each advisor should fill out his/her own paperwork by adhering to the following simple instructions.

I. Travel Procedures and Paperwork

A. **Student Travel Form:** Obtain the typeable form from the Advisor.

Complete and submit the Student Travel Form to the advisor and club president to obtain the appropriate approvals, then route typed form and other supporting documents (conference registration costs, hotel estimates, etc.) to Student.Engagement@FSW.edu for approval.

Omitting any information from the form will result in a significant delay in processing.

Completed forms must be submitted four weeks prior to the event (six weeks if involves out of district travel). No plans or preparations should be made until all forms have been submitted and approved by Student Engagement. If seeking additional funding support then it is recommended to submit all documents at least six weeks in advance. (There is funding to help supplement the additional costs associated with traveling for professional development to conferences.)

B. **Travel Authorization Form:** Required only if a Staff/Faculty member is traveling with a group of FSW students.

Submit this signed form to Student Engagement, along with the completed Activity Request or submit soon after. This may be scanned and emailed (prior to trip but must be official document with original signatures post trip).

Travel Authorization Forms must be completed before any off-campus club-sponsored event for the trip to be considered official, and to use club funds to cover expenses. The advisor must complete a travel form for the group. The form must list the names of all the students that are traveling on the third page under the section, "Group Travel."

A copy of the event/conference agenda or appropriate documentation must accompany the travel form, to confirm that there is actually a reason for the traveling.

The Travel Authorization form (only the authorization form—not the reimbursement forms) should be completed, signed by the traveler and their supervisor, and then submitted to the Student Engagement prior to departure (at least two weeks before). If authorization forms are turned in within two weeks of departure, the trip may be denied.

C. **Travel expenses:** As soon as you receive confirmation from Student Engagement, you do not have to use personal credit card to pay for all expenses up front. If completed and approved enough in advance, you may complete a check request to pay for conference/hotel fees. You may need to still use personal credit to reserve or hold hotel rooms, but a check can be cut and mailed prior for the actual payment. If this advance method is preferred, then recommend submitting initial request at least seven (7) weeks in advance. Use the "Check Request" form to

initiate the cutting of a check for any and all purposes associated with the trip. Remember to provide proper documentation (more is better) with all requests. These forms should be submitted to Student Engagement no less than six weeks before the trip.

- D. **Code of the Road:** The Code of the Road Delegate Contract sets the guidelines for club members on off-campus excursions. All FSW student organizations are responsible for using the code of the Road. It should be read and signed by all trip attendees, then submitted to the appropriate Advisor or designee traveling with the group. This form allows the student to receive medical attention, emergency contact, and informs the student that they are still held accountable for adhering to the Student Code of Conduct.
- E. **FSW Students and Advisors Only:** Club sponsored trips are for members of that organization and advisor only. Friends, family members, and other non-College related acquaintances should not accompany students and/or advisor on these trips, unless special arrangements are approved through Student Engagement.
Note: Regardless of how an organization reaches its trip destination, **remember:** this is an outside-classroom learning experience that you are allowed to attend. While learning, networking, and socializing are all important, certain safety considerations must always be adhered to.
- F. **Advisor Responsibilities for Off-Campus Travel Form:** The club advisor must read and sign the Advisor Responsibilities for Off-Campus Travel Form, and submit it to the appropriate Student Engagement staff member prior to departure.

II. **Transportation**

Members of clubs may use rental vehicles, commercial transportation, or their personal vehicles for club trips and conferences. However, there are certain stipulations attached to all these means of transportation and paperwork to be completed.

- A. **College or Rental Vehicle:** No student may drive a College vehicle or rental on behalf of the College or any club unless that student is an employee of the College. If the club advisor or supervisor asks a student to drive a vehicle on behalf of the College, the following must be done: (1) make a copy of the student's Employment Authorization form and valid driver's license, (2) submit this to the appropriate Student Engagement staff member for approval two weeks prior to departure. (3) Personal vehicle: If the student has permission of the appropriate Student Engagement staff member and the club advisor to drive his/her own vehicle (not a rental or college vehicle) to a conference, the student's own insurance should provide coverage. The student must drive in "caravan" style with the advisor.
- B. **Public Transportation:** Commercial transportation includes air, train, bus and boat. Because students and groups are often afforded discounts, the appropriate Student Engagement staff member and/or club advisor should always be consulted prior to making any reservations. All proper paperwork must be submitted before arrangements are made. If transportation is provided by a vehicle rented on a College purchase order, non-students and non-College employees are not covered under the insurance of the College.

III. **Travel Reimbursement**

The College uses a Travel Authorization Form for students and staff travel. Should anyone or any organization need reimbursement for hotel, gas, parking, tolls, transportation, etc., this form must be completed and submitted to a Student Engagement staff member *after returning from the trip*.



Be sure to submit original receipts for all expenditures that require reimbursement. It is a good idea to make a copy of the original receipts for the club treasurer and advisor for record keeping purposes.

A. Pay in Advance:

a. Student organizations are encouraged to pay for as many expenses as possible before the trip. Expenses for conference registration, hotel, commercial transportation, and/or rental car may be paid in advance by submitting Check Request for payment along with the Invoice totaling the cost. Travel Authorization Forms.

1. Check Request for payment Forms should be:

- » Made payable to the specific Conference/Hotel, and payment address must be provided.
- » Indicate the names of students being registered and the cost for each (suggest including detailed attachment if 3 or more students which lists students names and information about rooms)
- » Submit to the signed paper copies to the Student Engagement Office. After obtaining the Budget Administrator signature, the forms will be routed to Accounting for processing. Must include conference registration/itemized hotel costs. Also include conference agenda.

2. The Accounts Payable department will mail a check to Conference/Hotel as indicated on the Check Requests on behalf of the FSW organization. If traveling in state of Florida, provide copy of FSW's state tax-exempt status. Please clarify this with the hotel so that the costs do not reflect state taxes.

3. When the organization returns from the trip, the Voucher for Reimbursement of Travel Expenses section of the Travel Authorization Form is completed with exact figures for expenses. The total amount owed the traveler or owed the College will be evident on the Travel Authorization Form and documented by attaching the original receipts.

B. Pay upon Return:

1. As mentioned above, before departure the advisor should submit the Travel Authorization Form with Traveler Information, Travel Authorization, and Group Travel sections completed to the appropriate Student Engagement staff member. The names of the students that are traveling must be listed under the Group Travel Section.
2. Upon return from the trip, the organization needs to complete paperwork for Reimbursement which totals all expenses. These are for expenses that occurred during the trip. The College will pay the amount due to the traveler(s). The total amount due should be evident on the Travel Authorization Form and supported with original trip receipts. Note: The advisor is ultimately responsible for payment, since his/her name is on the card as well.

C. Travel Advance:

1. Advisor may receive up to 75% of their meal expenses before the trip. The advisor need only complete the Traveler Information, Travel Authorization and Group Travel sections of

the Travel Authorization Form, and a Request for Payment Form made out in the amount of estimated expenses payable to the advisor.

2. Submit these documents with conference documentation to the appropriate Student Engagement staff member for appropriate signatures.
3. The amount of travel advance must exceed \$75.00.
4. Submit the information two weeks prior to departure for a check to be issued to the advisor before the trip.
5. Upon return, complete the Voucher for Reimbursement of Travel Expenses section of Travel Authorization Form with exact figures and attach original receipts. (If the advisor owes the College, or the College owes the advisor, it will be indicated on the Travel Authorization Form and supported with original receipts.)

IV. Timeline of travel processes Recap (for the Advisor):

1. Before you go:
 - a. You need to seek authorization from Student Engagement. Fill out the Activity Request Form (instructions in 1A above) and complete the Travel Authorization form (instructions in 1B above) with all the information you have. The instructions are on the first tab of the TA worksheets. You don't need to send the reimbursement vouchers beforehand—just the first sheet. Estimate the costs for each aspect of your trip, as prompted on the form.
 - b. Attach an agenda or some form of supporting documentation to prove there's actually a reason for your traveling.
 - c. SCAN/COPY EVERYTHING after it's been signed. Things get lost.
 - d. Send the signed Travel Authorization form and supporting documents to the Student Engagement Office.
 - e. Reserve any vehicle you'll need. To do this, you'll need to get a quote from the vendor. If time allows, and the rental car company accepts checks. You can submit a Check Request to pay up front. However you may still need to use your personal credit card for incidentals. Or you can use personal credit card and then submit for reimbursement upon return from trip. Provide copy of receipts for rental car and gas.
 - f. Have each student going on the trip fill out and sign a "Code of the Road" form (instructions in 1D above). If the trip involves physical activity, then also have them complete the Off Campus Liability Waiver, for liability purposes (Request this form by emailing Student.Engagement@FSW.edu).
 - g. Reserve any hotel rooms, and have them send (email or fax) you a quote. Use this quote to request a check using the "Check Request" form. Do this far enough in advance to have the check produced in time to take with you. It's recommended you do it no less than three weeks before the trip.
2. While you're gone:
 - a. Keep all your receipts for food, fuel, and any necessary incidental expenditures.
 - b. Keep the Code of the Road forms with you at all times, in case of emergency.
 - c. Record all students' cell phone numbers.
 - d. Enjoy your trip!

3. When you get back:
 - a. Fill out the other two forms of the Travel Authorization form (the second and third tabs dealing with reimbursement). Attach all original receipts—if they're not original receipts, you risk not being reimbursed. Also attach an agenda or something from the conference/meeting, to prove you really went. You don't need to turn in the actual travel authorization form again (the first sheet).
 - b. Make sure Page 1 and Page 2 of the TA form are signed by the Traveler and the Supervisor.
 - c. SCAN/COPY!
 - d. Send the forms and receipts to the Student Engagement office. The Budget Administrator will review and sign, after it is determined complete. And then we will route to Accounting for processing. The Check Requests are typically processed within 7-14 business days.