

Travel and You

How you can prepare for the adventure
of Academic Senate forms and
PeopleSoft

*Parts of this presentation
were borrowed from Mesa
College Faculty training.



So what is the process?

- There are 3 basic steps:
 1. Program Chair and/or Dean approval
 2. Academic Senate approval
 3. PeopleSoft:
 - TA: Travel Authorization (before travel)
 - ER: Expense Report (after travel)



SDCE.edu → Organization → Faculty and Staff Resources



Academic Areas Student Services - Certificate Programs - Organization - News Room

Travel and Conference Forms

[Organization](#) / [Participatory Governance](#) / [Academic Senate](#) / Travel and Conference Forms

Academic Senate Professional Development (travel request) Instructions can be found [here](#).

All documents must be submitted to Academic Senate 4-5 weeks before conference/travel.

STEP 1. Fill out the [CONFERENCE/TRAVEL PRE-AUTHORIZATION](#) form.

- Send form and all supporting documents to Department Chair (or Dean).
- Department Chair (or Dean) approval required.
- Department Chair (or Dean) will send the approved request to Academic Senate Treasurer.

STEP 2. Faculty member will receive confirmation from Academic Senate Treasurer.

- Confirmation will be sent via email.

*Need assistance with STEP 3 and/or 4 (submitting a TA/ER)? Please contact Business Services (ECC) at (619) 388-4821.

STEP 3. Before travel, create your [TRAVEL AUTHORIZATION \(TA\)](#) through PeopleSoft. UPDATED Instructions as of 6/7/19.

- Faculty member will receive approval email. [Example email](#).
- Recommend to not travel until the TA is approved.

STEP 4. After travel, complete your [TRAVEL EXPENSE REPORT \(ER\)](#) through PeopleSoft. UPDATED Instructions as of 6/7/19.

- Must be completed within 10 days of returning.

Questions? Please contact Academic Senate Treasurer.

Olivia Flores, Counselor, Cesar Chavez Campus

<http://sdce.edu/>

So what is the process?

- There are 3 basic steps:
 1. Program Chair and/or Dean approval
 - The Academic Senate Conference/Travel Pre-Authorization form can be found on the website.
 - Faculty can give the form to their PC and/or Dean. Faculty can also email it or send it via district mail. Talk with your PC and/or Dean.
 - Faculty should include copies of supporting/travel documents. More on supporting documents see page 11, TA FAQs.

Questions?

SDCE.edu → Organization → Faculty and Staff Resources → Faculty Travel and Conference Forms

ACADEMIC SENATE CONFERENCE/ TRAVEL PRE- AUTHORIZATION

The pdf form is fill-able
so you can type your
information on the form
before you print.

SDCE ACADEMIC SENATE CONFERENCE/TRAVEL PRE-AUTHORIZATION SPECIAL STAFF DEVELOPMENT FUNDS (Allow 5 weeks prior to the event for processing)			
EMPLOYEE & CONFERENCE INFORMATION			
Name:	Contact Phone:	Employee CSID:	
Program:	Campus:		
Conference/Event Name:	Dates:		
Conference Location:	(Including travel Dates)		
Will you need a substitute?	Note: A total of 3 days is the maximum allowable.		
Total sub hours requested	(Number hours per day x number of days)		
ESTIMATED EXPENSES			
Must comply with District Travel Procedure 6310 and Administrative Procedure 6310.1 (https://www.sdced.edu/about/leadership/board-of-trustees/board-policies/index.aspx), Business Services section. Please note: advances will not be funded by the Special Staff Development Committee (Reimbursement only).			
CATEGORY			
Registration:			
Transportation:	Air (Estimation of flight cost)		
	Car (Personal)	Miles @	(Set by IRS, Refer to TR)
Lodging:		days @	
Meals:		days @	
Miscellaneous:	(Taxi, shuttle, bus, phone, etc.)		
Total Reimbursement Requested (\$1,800 maximum)			
PURPOSE OF TRAVEL AND OUTCOMES			
Purpose of travel (Funds are granted when the travel request results in the improvement of classroom instruction or the improvement of services to students):			
Please check the activities you will complete after receiving funds.			
<input type="checkbox"/> Presentation at a Flex session	<input type="checkbox"/> Written report		
<input type="checkbox"/> Presentation at a department meeting	<input type="checkbox"/> Written article for publication		
REQUESTOR'S SIGNATURE _____			
APPROVAL SIGNATURES:			
PROGRAM CHAIR _____		Date _____	
ASCCC SPECIAL FUND COMMITTEE RECOMMENDATION			
APPROVED <input type="checkbox"/>	DENIED <input type="checkbox"/>	Academic Senate Signature _____	Date _____
13.6 PROFESSIONAL DEVELOPMENT ACTIVITIES FOR ALL CONTINUING EDUCATION FACULTY 13.6.1 In the event there are unused sabbatical leaves as specified in Article 9.12.3, the unallocated sabbatical funds shall be re-allocated for professional development and travel and conference activities for all continuing education faculty. 13.6.2 Faculty interested in applying for these funds must first seek approval from their department chair and dean. Requests will then be forwarded to the continuing education academic senate professional development committee for final approval.			
NAME OF SUBSTITUTE (for Business Services only): _____			
Update 08/2019			

So what is the process?

- There are 3 basic steps:
 - ~~✓ Program Chair and/or Dean approval~~
 - 2. Academic Senate approval
 - Faculty should remind/request PC and/or Dean to send Pre-Authorization form and supporting documents to Academic Senate Treasurer. Check page 11, TA FAQ's.
 - AS Treasurer will review the request, usually takes 1-2 weeks.
 - AS Treasurer will email Faculty with approval or clarifying questions.
 - Faculty should NOT start the PeopleSoft process until after receiving approval from AS Treasurer.

So what is the process?

- There are 3 basic steps:
 - ✓ ~~Program Chair and/or Dean approval~~
 - ✓ ~~Academic Senate approval~~
- 3. PeopleSoft: TA and ER (before and after travel)
 - TA: Travel Authorization (before travel)
 - ER: Expense Report (after travel)



The Pre-Authorization Travel Form

- This is a **MANDATORY** form for **ALL** travelers before **ANY** Travel Authorization can be entered in PeopleSoft:
 - <https://sdce.edu/organization/governance/academic-senate/resources>
 - Along with this form, you will need to have supporting/travel documents, presented later in the FAQs.
- This form needs to be completed with:
 - Travel costs
 - All reimbursement requests must include supporting/travel documents. Page 11
 - Signatures (or email approval) of PC and/or Dean.

SDCE ACADEMIC SENATE
CONFERENCE/TRAVEL PRE-AUTHORIZATION
SPECIAL STAFF DEVELOPMENT FUNDS
(Allow 5 weeks prior to the event for processing)

EMPLOYEE & CONFERENCE INFORMATION	
Name: _____	Contact Phone: _____ Employee CSID: _____
Program: _____	Campus: _____
Conference/Event Name: _____	Dates: _____ (including travel Dates)
Conference Location: _____	Will you need a substitute? <input type="checkbox"/> Yes <input type="checkbox"/> No
Total sub hours requested: 0	Note: A total of 3 days is the maximum allowable. (Number hours per day x number of days)

ESTIMATED EXPENSES

Must comply with District Travel Procedure 6310 and Administrative Procedure 6310.1 (<https://www.sdsu.edu/about/leadership/board-of-trustees/board-policies/index.aspx>). Business Services section.
Please note: advances will not be funded by the Special Staff Development Committee (Reimbursement only).

CATEGORY	
Registration:	
Transportation: Air (Estimation of flight cost)	Miles @ _____ (Set by IRS, Refer to TR)
	Car (Personal) _____ days @ _____
Lodging:	_____ days @ _____
Meals:	_____ days @ _____
Miscellaneous: (Taxi, shuttle, bus, phone, etc.)	_____
Total Reimbursement Requested (\$1,800 maximum)	

PURPOSE OF TRAVEL AND OUTCOMES

Purpose of travel (Funds are granted when the travel request results in the improvement of classroom instruction or the improvement of services to students):

Please check the activities you will complete after receiving funds.

<input type="checkbox"/> Presentation at a Flex session	<input type="checkbox"/> Written report
<input type="checkbox"/> Presentation at a department meeting	<input type="checkbox"/> Written article for publication

REQUESTOR'S SIGNATURE _____

APPROVAL SIGNATURES:	
PROGRAM CHAIR _____	Date _____
ASCCC SPECIAL FUND COMMITTEE RECOMMENDATION _____	
APPROVED <input type="checkbox"/> DENIED <input type="checkbox"/> Academic Senate Signature _____	Date _____

Employee Paid Travel

- Travel Authorizations (TA) should be entered for approval in PeopleSoft **at minimum 4 weeks in advance**
- The TA **MUST** be approved before the travel happens
- Please note the process is a basic workflow and does not account for all special circumstances.



TA FAQs

- What is the difference between a Pre-Auth Travel Form and a TA in PeopleSoft? Aren't they the same?
 - **No!**
 - Your Pre-Authorization form confirms:
 - What expenses are being reimbursed by Academic Senate
 - Verifies PC and/or Dean approval for the travel.
 - The information from the Pre-Auth is then entered into your PeopleSoft TA
 - The PeopleSoft TA goes through another approval workflow to ensure funding is secured for your travel and...
 - ... to account for your travel as a district employee.

Travel & Expense	▼
Travel Authorization	
Expense Report	
Cash Advance	
Request a Payment	
Travel and Expense Center	

TA FAQs Contd.

- What are considered supporting/travel documents for my Pre-Authorization and TA?
 - Conference registration (or screen capture) - showing dates, location and price
 - Conference program/agenda
 - Hotel reservation
 - Airfare costs
 - Shuttle, taxi, Lift/Uber estimates
 - Mileage - Print out a mileage map from MapQuest or Google maps. (The IRS reimbursement mileage multiplier varies and is reset by the District as needed)
 - Meal receipts not required. Maximum \$46/day (breakfast \$10, lunch \$15, dinner \$21), if meals are not included in the conference.

TA FAQs Contd.

- What are considered allowable expenses?
 - For a list of allowable and non-allowable expenses, see district document AP 6310.1.
 - If a conference provides meals, those meals should not be included in total. AS Treasurer may request a copy of the conference agenda.
- What needs to be attached in my TA in PeopleSoft?
 - Pre-Authorization and supporting/travel documents as noted in previous slide or on Instructions page.

TA FAQs Contd.

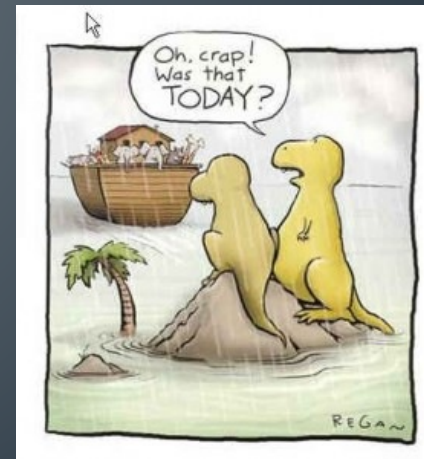
- You said my travel can't happen without TA approval. How do I know if it's approved? Doesn't entering it count?
 - **No!**
 - You will receive an email generated via PeopleSoft and/or VP/President that your Travel Authorization has been approved.
- I entered my TA with time to spare, but it's been a while and I still haven't received my approval. What should I do?
 - Please contact the Acct Tech at your site to follow up on your TA.
 - Academic Senate does not have access to Faculty PeopleSoft accounts.

Expense Report FAQs

- I've completed my travel. Am I done in PeopleSoft?
 - **No!**
 - An expense report must be submitted to close out your travel authorization.
 - The expense report is a separate process and must be linked to your TA.
 - The expense report is how you will be reimbursed for your actual expenses.
- I've gone over my approved TA amount. Now what?
 - Please contact AS Treasurer to see if additional funding is available.
 - If additional funding is approved, the Pre-Auth needs to be updated to reflect this new amount with new signatures and dates.

Expense Report FAQs Contd.

- How long do I have to enter my Expense Report after I get back?
 - Per district policy, you have 10 days to from your return date to enter your expense report.
 - If you go past these 10 days, please contact the Acct Tech at your site.
- What needs to be attached to my Expense Report?
 - Pre-Authorization Form
 - Name badge (if provided)
 - Conference Agenda
 - Receipts for all expenses



Academic Senate Professional Development Instructions

The Instructions page can be found on the website. It includes contact information for Acct Techs at each site.

SDCE ACADEMIC SENATE

PROFESSIONAL DEVELOPMENT INSTRUCTIONS

Please note: All request are subject to Senate review. For a list of allowable and non-allowable expenses, see district document [AP 6310.1](#).

STEP 1. FILLING OUT THE CONFERENCE/TRAVEL PRE-AUTHORIZATION form

- At least four (4) weeks before travel fill out the Academic Senate [Conference/Travel Pre-Authorization Form, here](#).
- Along with the Pre-Authorization form, scan and email the following documents to your Program Chair (PC):
 - Conference registration (or screen capture) - showing dates, location and price
 - Conference program
 - Hotel reservation
 - Airfare costs
 - Mileage - Print out a mileage map from MapQuest or Google maps. (The IRS reimbursement mileage multiplier varies and is reset by the District as needed)
 - Meal receipts not required. Maximum \$46/day (breakfast \$10, lunch \$15, dinner \$21) if meals are not included in the conference.
- Your Program Chair (PC) will email the packet to the Academic Senate Treasurer. This will constitute your PC's approval for your travel.

STEP 2. RECEIVING CONFIRMATION

Treasurer will send you an email either approving or not approving the travel request. The email is your letter of approval. Keep an electronic copy and attach when uploading documents to PeopleSoft.

STEP 3. CREATE YOUR ONLINE (PEOPLESFT) TRAVEL AUTHORIZATION (TA)

- Go to [myportal.sdccd.edu](#) and create your PeopleSoft TA
- Download instructions: [Before Travel & Conference \(PeopleSoft Instructions\) here](#).

*Pre-Pay: If you choose to have the district pre-pay for your conference and hotel fees print out and follow these additional instructions: [Pre-Payment \(PeopleSoft Instructions\) here](#).

- Attach all of the above listed (Step 1, #2. a-e) plus the email from the Senate Treasurer.
- Use the following codes:

GL Unit Code	Fund Code	Department Code	Production Code	Operating Unit
CED01	1110	41500	499904	(leave blank)

- When completed hit submit. A tracking number will be created.

Need Assistance? Set up an appointment with your campus accounting technician:

ECC: room 109	Damella Abbott; Floreniza (Carla) Yumul	M-F: 7 am - 4 pm	x 4821
Cesar Chavez	Albera Warsi: awarsi@sdccd.edu	M-F: 1:30 – 3:30pm	x 1919
Mid City	Danielle Williams: dwilliam@sdccd.edu	T & Th	x 4543
North City/CE Mesa	Lily Mino: lmino@sdccd.edu	M-F: 9 am - 1pm	x 1828
West City	Vanessa Kwong: vkwong@sdccd.edu	M-F: 7 am - 4 pm	x 1863

STEP 4. UPON COMPLETION OF TRAVEL

Within 10 days, complete your Expense Report online [myportal.sdccd.edu](#).

You can download instructions: [After Travel & Conference \(PeopleSoft Instructions\) here](#).

Academic Senate is on break June 4 – Aug 24, 2020.

The last day to submit a request is May 29, 2020

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