

San Diego Mesa College Travel Process

Travel authorizations must be submitted into the People Soft system for approval. All travel with expenses must be submitted and approved in People Soft before the travel takes place. This includes in person travel and virtual conferences.

Required Forms and Approvals for Travel

The documents required for travel are the completed Preauthorization Travel Form and back up travel documents (i.e. conference registration, conference agenda/schedule, hotel reservation, airfare reservation, mileage map for driving). The traveler needs to provide the Preauthorization Travel Form to their manager/dean and budget owners for review and approval.

There are fields on the form for required signatures, budget numbers, and approved amount of funding. Approvals via email will be accepted too. If the Preauthorization Travel Form is incomplete or back up travel documents are not provided the traveler will not be able to move forward with travel process. The Preauthorization Travel Form and other supporting travel documents will need to be attached to the travel authorization in People Soft when submitted for approval. (link to preauthorization form)

Funding for Travel

There are various sources for travel funding for all employees. Please work with your department to seek funding. If you are unable to secure funding from your department there are various sources such as the Conference and Travel Committee or other grants and special funding that could provide funds. The individuals who oversee the funding will provide you with the budget number, the approved amount of funding, and approve with a signature on the Preauthorization Travel Form or via email.

Employees can pay for their travel expenses out of pocket or request that the District prepay certain expenses.

Prepaid Travel Expenses

Travel expenses (e.g. conference registration, hotel reservation, airfare) can be paid in advance. Please note this on the Preauthorization Travel Form, and in the travel authorization in People Soft. Confirm with the conference vendor and the hotel that they will accept payment via check. Also, contact Business Services to confirm that the vendor and hotel are approved suppliers with District. Additional paperwork might be required for this process. (link to diagram for prepaid request).

International Travel and Restricted States

International travel must be approved by the Chancellor. Travel to restricted states must be approved by the President. Current restricted states are Alabama, Florida, Idaho, Iowa, Kansas, Kentucky, Mississippi, Montana, Oklahoma, N. Carolina, S. Carolina, S. Dakota, Tennessee, Texas, West Virginia. Please work with your dean or supervisor to coordinate approvals with the President's Office. The approval which usually comes in the form of a memo or email will need to be part of your back up travel documents and submitted with the travel authorization in People Soft.

Student Travel

Students who will be traveling on behalf of the District need to have completed the required SDCCD student travel documents. Their expenses will be accounted for under the travel authorization of the SDCCD employee who will be attending the conference/event with them.

https://www.sdccd.edu/docs/SSDept/Brochures/Student_Travel_Guidelines.pdf

Below are the steps for the travel process.

1. Fill out Preauthorization Travel Form
2. Submit the completed form and back-up travel documents to manager/dean. Travel will be approved if appropriately related to work.
3. Secure funding and approval from budget manager
4. If this is in person travel, due to COVID 19, the approval will need to be at VP level. Please contact your VP for approval.
5. Once Preauthorization Travel Form is fully completed and approved, submit travel authorization in People Soft for approval.
*Contact Business Services for assistance with inputting Travel Authorization into People Soft
6. Submitted travel authorization will go through approval process in People Soft, and final approval will come via email from Mesa President.

Timeline to Submitting Travel in PeopleSoft

If submitting a Travel Authorization with out of pocket expenses and requesting a refund to employee submit travel authorization with completed and approved Preauthorization Travel Form and back-up documents 4 weeks' prior conference to ensure Travel Authorization is approved in PeopleSoft

If submitting a Travel Authorization with pre-pay expenses, submit travel authorization with completed and approved Preauthorization Travel Form and back-up documents at least 5 to 6 weeks in advance to ensure there is enough time for the Travel Authorization to be approved in PeopleSoft and a Payment Request to be processed to pay vendor for expense.

Closing Out Travel

Once travel has been completed an Expense Report needs to be submitted in People Soft. The Expense Report will need to have attached receipts for your approved expenses, Preauthorization Travel Form, and proof of attendance if provided by the conference (e.g. name badge or final agenda). The report will be submitted for approval to process the traveler's reimbursement and close out the travel.

**** In Person Travel During COVID-19**

All in person travel during COVID-19 must be approved in advance by the appropriate Vice President in relation to the employee's department. Approvals can be done via email or the preauthorization travel form can be signed by VP.