

San Diego Mesa College Travel Process

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

If you need assistance with submitting a travel authorization or an expense report, please contact Business Services (ext. 2771). Also, you can send your travel documents to MesaTravel@sdccd.edu. Please send all documents in one email.

Required Forms and Approvals for Travel

The documents required for travel are the completed Preauthorization Travel Form and back up travel documents (e.g. 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. 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.

Preauthorization Travel Form can be found at <https://www.sdmesa.edu/college-services/administrative-services/forms/index.shtml>

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.

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, Arizona, Arkansas, Florida, Georgia, Idaho, Iowa, Kansas, Kentucky, Louisiana, Mississippi, Montana, Ohio, Oklahoma, N. Carolina, S. Carolina, N. Dakota, S. Dakota, Tennessee, Texas, Utah, and 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 PeopleSoft.

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. Once Preauthorization Travel Form is fully completed and approved, submit travel authorization in People Soft for approval. Preauthorization travel form and supporting travel documents must be attached to the TA in PeopleSoft.
***Contact Business Services for assistance with inputting Travel Authorization into People Soft.**
5. Submitted TA will go through approval process in PeopleSoft, and final approval will come via email from Mesa President.

Timeline to Submitting Travel in PeopleSoft

If submitting a TA 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 5-6 weeks prior conference to ensure Travel Authorization is approved in PeopleSoft.

If submitting a Travel Authorization with pre-paid expenses, submit travel authorization with completed and approved Preauthorization Travel Form and back-up documents at least 6-8 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 (ER) needs to be submitted in PeopleSoft. The ER 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.