CCOT Travel Policy

The purpose of this policy is to establish the requirements and responsibilities for conducting University-related domestic and international travel. The policy supports traveler safety, mitigates financial risk, complies with applicable regulations (including federal, state, and international), and fosters prudent use of University/College/School resources.

Travel for faculty is used to continue education, provide professional development opportunities, meet with colleagues from other institutions, and take students to events/competitions. We must always remember our first responsibility is to educate our students. This means we need to be selective when we are gone to ensure the quality of our students' education does not suffer.

All travel approvals are at the discretion of the Director, Dean, and Provost and is contingent upon funding. Invitations or Calls for Papers/Presentations do not constitute automatic approvals of travel. All guidelines must be followed.

Traveler Responsibilities:

1. The CCOT TRAVEL PROPOSAL FORM needs fill out as accurately and as completely as possible. This includes, but is not limited to "estimating" all costs: hotel, rental cars, ground transportation, flights, agendas, registration costs, per diem, etc. It is better to estimate high, rather than low. The rates for these can be found at:
    a. Personal Vehicle: If a personal vehicle is approved, the rate for travel can be calculated by the distance to and from the airport times the mileage rate which can be found at the following web address: https://admin.ks.gov/offices/accounts-reports/informational-messages-and-circulars/25-a-008-fy-2025-private-vehicle-mileage-rates-supercedes-25-a-001.
    b. Per Diem Rates: Per diem is easy to estimate. Take the number of days you will be gone times the allowable daily per diem which is found at the following web address: https://www.gsa.gov/travel/plan-book/per-diem-rates. The actual cost will be calculated upon return since that is when the traveler will know when they left and when they returned as well as the number of included meals.
2. Be as specific as possible when providing a justification on the CCOT TRAVEL PROPOSAL FORM. Describe the reason for, location, and dates of the travel. Include information on any additional travelers: colleagues', students, family members, and describe any personal travel that will occur during the trip. NOTE: Completion of the form does not guarantee travel approval by the director or dean.
3. After filling out the CCOT Travel Proposal Form, set up a meeting with your director to discuss your proposed travel, potential funding, justification for travel, and to ensure guidelines are followed in this document and are for acceptable travel. The CCOT Travel Proposal Form will require Director approval and possibly an authorized travel number before any purchases are allowed. Report any changes to the itinerary prior to participating in the travel to the director for re-approval. Itinerary changes made during a trip, not related to an unforeseen issue (flight cancellation, weather delay, etc.), will require re-approval upon return. The traveler will need to provide documentation from the airline, hotel, etc., if any variation is not within the traveler's control. Otherwise, the traveler could bear some or all of the expense. Changes made at the discretion of the faculty without approval when traveling which are within their control, (i.e. changing seats, changing flights to a later/earlier flight, staying overnight in a hotel, renting a car on a layover, etc.), will be at the traveler's expense.

4. Be a good steward of funding. The State of Kansas and the University requires travelers utilize the most cost-effective mode of travel. Hotel costs are also regulated by the state and if the traveler chooses to stay in a hotel costing more than the allotted rate, the traveler will incur the difference in cost. Conference hotels do not fall within that guideline. If staying at a conference hotel, please notate that on the CCOT Travel Proposal Form.
5. Once the CCOT travel proposal is signed by the director:
   a. If the trip expenses exceed $1000.00, the school's admin will complete a T-form to obtain a travel number needed by the business center. If travel exceeds $1000.00, NO pre-travel purchases may be made until a T-number is provided by the PSU Business Office to the school's admin who will place the CCOT Travel Proposal Form and the PSU Travel Form in the CCOT Business Center's digital repository under the traveler's name.
   b. If under $1000.00, a T-form is not required. Once the director has approved, the admin will place the CCOT Travel Proposal Form in the CCOT Business Center's digital repository under the traveler's name, and the traveler can begin making pre-travel purchases.
   NOTE: The CCOT Travel Proposal Form as well as the approved PSU T-form with T-number (if needed) will be placed by the Administrative Assistant/Specialist into the online CCOT Business Center repository under the traveler's name.
6. The traveler will visit with the Administrative Assistant/Specialist to make flight, hotel and other travel arrangements if the traveler does not have a procurement card. The Administrative Assistant/Specialist PSU Procurement card is the preferred method of payment for all travel related expenses (excluding food/meals) IF the traveler does not have a PSU procurement card.
   a. Hotel reservations made on the admin's card will require the traveler to coordinate/communicate with the hotel to accept a *Credit Card Authorization Form*. This form allows the traveler to use the admin's card for the room payment at the hotel without the physical presence of the card.
7. The traveler's personal funds/or card will be required for food/meals, parking, ground transportation and other unforeseen expenses. Note: A personal credit card can be used for all approved expenses. However, reimbursement may not be made until the conclusion of travel, meaning the traveler may have the expense on their card for months if flights or hotels, registrations, hotels, etc., are paid for on a personal card.
8. Make appropriate arrangements for teaching your classes and assisting students when you are gone. Provide your school director with your plans for the alternate student learning activity, colleague coverage, etc. This includes the completion of the "CCOT ABSENCE FORM", which must be completed and approved by the school director.
9. Keep a copy of all receipts (print or digital), as well as a copy of the conference agenda (if applicable).
10. Submitting Expense Receipts and Reimbursement Requests
    a. All receipts obtained prior to travel (plane tickets, hotels, registrations, etc.) must be submitted within seven (7) days of the purchase on a university procurement card. If a faculty member with their own university procurement card fails to comply with this requirement on more than one occasion, that person will lose the privilege of having a university procurement card. It is understood some expenses such as flights or hotels may be on the card for an extended time. However, most of the time, the card holder should submit receipts in the required time frame.
    b. All receipts obtained during travel must be submitted to your school Business Center within seven (7) days of the conclusion of travel using the online portal.
    c. All expense receipts must be submitted using the online business form. It is recommended that you keep receipts of everything submitted digitally or in hard copy form.

    d. It is up to the traveler to request reimbursement for any out-of-pocket expenses incurred while traveling. This includes reimbursement for per diem, private vehicle mileage and out-of-pocket transportation costs such as fuel, Uber/Lift, tolls, etc.
    e. Lost or missing receipts require a PSU Policy Exception Request Form. This form must be completed by the faculty member and approved/signed by the Director. The PSU Policy Exception Request From is also due within seven (7) days of the completion of the trip.
11. International travel – all international travel guidelines and restrictions need to be followed.

NOTE: Not following these guidelines will result in non-approval of future travel opportunities.

Types of Travel:

1. Type 1 - Conference/Faculty Development/Presentations/etc.
    a. Travel is limited to one event per semester (contingent upon funding).
    b. Summer and Winter break travel is allowed once within an academic year at the discretion of the Director and Dean.
    c. An approved CCOT Travel Proposal Form and CCOT Out-Of-Office form are required for travel
2. Type 2 - Faculty Advisor for Student Group or Organization
    a. Faculty must fill out paperwork for themselves and the student group.
    b. All appropriate permissions for students must be collected and turned in.
    c. Faculty advisors of student organizations traveling for student events, with students, will not have trips count against the number of trips they take as outlined in Type 1 Travel.
    d. Simply having a student on a trip does not necessarily qualify as a student group function. The Director, Dean, or Provost has the responsibility to verify that this section is being used correctly and can deny travel and/or assist in the documentation indicating that this is indeed a student organization trip or faculty development travel.
    e. Students will be informed of their out-of-pocket expense before travel is approved. The commitment letter must be signed by the student. This is to reduce the number of students who sign up and then back-out of the trip. It is recommended the students submit earnest money to also reduce the number of cancellations.
    f. Faculty leading a student organization trip are to write a letter to be distributed to each student participant identifying the date, time, location and purpose of this trip so that the student participants can share with their instructors across campus describing their absence from class. NOTE: this does not mean that faculty instructors must accept this as an excused absence from each of their classes. This letter should be provided to the student participants as far in advance as possible, so that each student can communicate with their instructors and make any necessary arrangements for their participation in this event.
    g. An approved CCOT Travel Proposal Form and CCOT Out-Of-Office form are required for travel
3. Type 3 - Travel paid for by outside source(s)
    a. Faculty members are still required to complete a travel request form.
    b. Travel must be approved by Director and Dean.
    c. This will count as Type 1 travel: faculty development. You may request that your Director not count this event, but it is at their discretion.
    d. Course coverage in your absence is required.
    e. All travel expenses are to follow the same guidelines as described above.
    f. An approved CCOT Travel Proposal Form and CCOT Out-Of-Office form are required for travel
4. Type 4 - Recruiting Events

~~a.~~ They do not count towards Type 1 travel, as long as the trip is approved by your Director prior to your departure.
b. Again, keep all receipts and submit by required dates.
c. The CCOT Out-Of-Office Form and CCOT Travel Proposal Form are required.

5. Type 5 - Director/Dean Designated
   a. This is a travel category that your Director, Dean or Provost requires you to go on.
   b. Follow all traveler responsibilities as outlined above.
   c. This does not count towards Type 1 travel.
   d. The CCOT Out-Of-Office Form and CCOT Travel Proposal Form are required.
6. Type 6 - Other
   a. Trips related to, but not limited to, travel for faculty positions held on campus or other items not covered above, must be approved by Director, Dean, and/or Provost. All travel policies must be followed, and funding must be secured prior to any travel. The CCOT Out-Of-Office Form and CCOT Travel Proposal Form are required.
   b. Replacement or substituting for another faculty member on a trip. The substitute faculty must have the availability to take the trip as outlined in Type 1 travel. If they have the availability, it will count towards the substitute's number of available opportunities as described in Type 1 travel. The change must be approved by the Director, Dean, and/or Provost. If no one can replace the original faculty member, it counts against the original faculty member's travel as explained in Type 1 travel. Meaning if the original faculty member cannot participate, and an alternate faculty member cannot be found – the trip is listed as an event taken by the original faculty approved for this activity. The CCOT Out-Of-Office Form and CCOT Travel Proposal Form are required.

Types of Forms:

1. CCOT TRAVEL CHECKLIST. This is for guidance and convenience only.
2. CCOT TRAVEL PROPOSAL FORM
   a. Must be submitted any time funding is needed for a trip.
   b. Travel requires overnight hotel stay
   c. Approval needs to happen 10 days before travel
3. CCOT OUT-OF-OFFICE FORM
   a. This form will be completed and approved at the school level. NOTE: This is needed to protect you from liability when on official business away from the university. If you don't know if you need one or not, ask your director.
   b. To be used when the following conditions apply:
      i. The faculty is away from the building in an official capacity. (Recruiting at a school, visiting student teachers, visiting companies, checking in on interns at a company, conferences, Chamber meetings, etc.) It is not needed
      ii. It needs filled out even if your classes are not impacted. If they are not impacted, indicate N/A (Not Applicable).
      iii. A copy of the signed document will on file for your protection in the event it is needed.
   c. It is not needed:
      i. if you leave campus early to attend your child's football/volleyball game for example.
      ii. to attend meetings on campus.
      iii. If going to Home Depot/Walmart to purchase materials for class.

Priority Travel:

1. Faculty working toward tenure.
2. Those who are on national, state, regional committees planning the event.
3. Other as approved by your school director.

Travel Funding:

The traveler needs to know the type(s) of funding sources prior to travel. Each time there is a travel opportunity an individual needs to work with Directors, Deans, and administrative assistants to determine how travel how the trip is funded.

There are various funding sources potentially available to the traveler. Possible funding sources are the school, college, university, student organization, grant or other outside organization funding the travel. Within the university there are a variety of funding sources, out-of-state travel, research related, and conference related.

Funding from different sources needs to be clarified by the traveler to determine if they can be combined. All trip expenses need to be documented along with the funding source(s) prior to approval for travel. Prior planning, providing documentation and scheduling a time to discuss the potential travel with the director are required to obtain approval prior to making any travel arrangements, and is the responsibility of the traveler.

Updated by CCOT Cabinet: October 14,, 2025
Introduced to CCOT Faculty/Staff at Opening Mtg: Aug 14, 2025

CCOT FACULTY TRAVEL CHECKLIST

CCOT Faculty and Staff follow the checklist below for travel. Procedures comply with the Pittsburg State University Travel Handbook. NOTE: Completing the CCOT Travel Proposal Form does not guarantee travel will be approved.

BEFORE TRAVEL

- ☐ 1) Complete the "CCOT Travel Proposal Form" for all travel <u>which requires funding</u>. Per Diem is based on the rate times the number of days travelling. Actual costs will be determined after you return.
- ☐ 2) Set up a time to meet with the director to discuss the travel. The filled CCOT Travel Proposal Form and the discussion will provide the director with the information needed to determine if the trip is within policy, if funding is available, and if course coverage if sufficient.
- ☐ 3) If approved and signed by the director, submit the CCOT Travel Proposal Form to the school admin.
    - **<u>If travel expenses are under $1000.00</u>**, the admin will upload the CCOT Travel Proposal Form to the Business Center shared file under the Traveler's name. The traveler can proceed with purchasing airline tickets, hotels, registrations, rental cars, etc., either using a procurement card.
    - **<u>If travel expenses are over $1000.00</u>**, the school admin uploads the proposal form to the Business Center shared file, AND will fill out the T-Form and send it to the PSU Business office for a t-from number. The traveler can proceed with pre-travel purchases (airline tickets, hotels, registrations, etc.). Once the admin receives a T-number, the admin will upload the T-form to the Business Center shared file.
    - Ensure you print/save all receipts for expenses and submit them to the business center if on a personal p-card, or to the admin if using the admin's p-card. This should be done within one week (7 days) of the purchase.

    NOTES FOR THE CCOT TRAVEL PROPOSAL FORM

    - Must include all travel dates, purpose of travel and estimated costs.
    - If using a rental car, it must be justified.
    - Use the most economical costs for travel (airfare, lodging, etc.)
    - Paying for expenses should be done on a procurement card if an individual has one. If the faculty member does not have a card, work with the admin to use their card.
    - Advances can be made if needed for special trip needs. (travelling with students, overseas, etc.)
    - Hotels may require a credit card authorization form if the traveler does not have a PSU procurement card and used the admin's card for reservations. The school admin can help secure.
- ☐ 4) Fill out the "CCOT Out-of-Office" form prior to travel (2 weeks out of state, 2 days in state) and submit to your director for signature.

DURING TRAVEL

- ☐ 1) Keep itemized receipts for all reimbursable expenses. (gas, tolls, baggage, uber, etc.) These are required for reimbursement.
- ☐ 2) Attend all scheduled sessions and events and collect proof of attendance (e.g. conference agenda)
- ☐ 3) Note: Tips for hotel/restaurant staff are included in per diem, and are not reimbursed separately.

AFTER TRAVEL

- ☐ 1) Submit expenses immediately upon return to the CCOT Business Center. Expenses must be submitted within one week (7 days) of the travelers return.
- ☐ 2) Submit a Lost Receipt/Exception form (if needed) for any lost receipts and submit to the business office.