Welcome to Portland State University’s Travel Workshop

Travel Policy & Viking Travel Module
Travel Website:

go.pdx.edu/vikingtravel
Traveler Responsibilities

Before traveling, the traveler should have a fully completed and approved travel authorization form.

(no authorization needed for in-state, with no airfare)
Travel should be in compliance with PSU policy which follows IRS policy. Accountability Plan. (defined and specific business purpose and receipts – if not choosing per diem)
Travel should be cost effective and beneficial for PSU. Must have complete and specific business purpose.
Travel forms with appropriate receipts/documentation must be accurate and timely (within 60 days of end of trip).
Traveler Payment Options

- Direct Billing
- Group Travel Card
- Personal Funds
- Invoice Sent to PSU via Contract
- Travel Advances
- P-Card (Conference Registration Only)
How to be reimbursed:

1. Traveler must use personal funds such as: credit card, checking, savings or cash for travel expenses in order to be reimbursed.
2. Traveler uploads and submits itemized receipts/documentation in the Viking Travel Module.
Remember!

NO travel expenses are to be sent on Personal reimbursement forms. Any travel expenses must go through Viking Travel for all employees and students. Use paper travel reimbursement forms for non-employees.
Direct Billed Rental Companies:
(Directions to direct bill are available on the Viking website)

Enterprise
Hertz
Zipcar
Direct Billed Lodging:

[Images of Modera Portland and University Place Hotel logos]
Direct Billed Travel Agencies:

- Journeys Travel Agency
- CI AZUMANO Travel
- UNIGLOBE Travel
Travel Advances

1. Check box in the Viking Travel Authorization Form

2. Flows into banner as an invoice and paid to traveler

3. Advances are cleared using Viking Travel Reimbursement form after trip and miscellaneous deposit form with check to PSU if advance greater than actual trip expenses

**Can receive no earlier than 2 weeks prior to trip**
Types of Travel

In-State (In-Oregon)
Includes Clark County

Out-of-State (Out-of-Oregon)
Destinations within the U.S.

Foreign
Any foreign countries
High vs. Low Cities
Low City: Lodging

• $132/night ($134, starting 2018)
• $25 non-traditional lodging
  • i.e. staying at someone’s house
• If using per diem, NO RECEIPT NEEDED
Low City: Meals

$57/day (25% B, 25% L, 50% D)

(No receipts required if claiming per diem; if receipts are attached we must go by actual costs but still at or below per diem amount.)

Overnight trips: 75% of total per diem for the first day and last day of travel
High City: Rates

Meals: $68/day

Lodging: $214/night
($216, starting 2018)
Mileage

- $.535 per mile
- Attach backup documentation (MapQuest or Google maps)
- If using mileage chart no backup necessary
- Must use most direct route
  - Home vs. office location
One-day trip: Meals

One-day trip meals are taxable, lunch is not allowable.

Departure/Arrival times based on two hours before or after work schedule
In-State: Transportation

Taxi from PSU to PDX - $40 each way, no receipts required.

Parking – $10/day max economy parking at PDX

Mileage from PSU to PDX airport is 13 miles

**If home is closer must use from home to PDX
Out-of-State: Transportation

Rental Car
- No rental car for conference
- No upgrades or GPS
- No added Insurance with contracted agencies

Taxi
- $75 and below no receipts required.
Airfare

- Use contracted agency (preferred) See Direct Billing Instructions
- Flight Itinerary
- No upgrades
- Do NOT use employee mileage for airfare. Cannot be reimbursed unless out of pocket.
The Conference Exception

Follow high rates for meals and the actual cost of hotel if you stay at the conference site hotel. You must attach conference agenda showing conference site hotel (hotel folio).

If meals are included at the conference or hotel, they cannot be claimed on the reimbursement.
Best Practices

• Use per diem

• Contracted agencies (preferred)

• If same destination on multiple days, print out one map

• Use mileage chart (frequently traveled cities)

• Travel Authorization must be completed and approved before travel (receive email confirmation at approval)

• Detailed daily itinerary or conference agenda
Foreign: Lodging

- Per diem rates vary by location ([http://aoprals.state.gov/web920/per_diem.asp](http://aoprals.state.gov/web920/per_diem.asp))
  
**If city is not listed must use “other” rate**

- If traveling for conference lodging reimbursed at actual cost with conference information and hotel folio

- Per Diem already includes Taxes

- No receipts required if claiming per diem
Foreign: Meals

- Per diem rates vary by location ([http://aoprals.state.gov/web920/per_diem.asp](http://aoprals.state.gov/web920/per_diem.asp))
- Meals included in conferences will not be reimbursed
- Incidentals are included in per diem rates
- No receipts required if claiming per diem
Foreign: Transportation/Airfare

- No quote needed from contracted agency
- Flight Itinerary
- No upgrades
- Taxi – itemization of to/from; no lump costs
- No receipt needed if under $75 each way
Foreign: Currency

OANDA ➔ (http://www.oanda.com/currency/converter/)

Conversion should be by day of receipt or using credit card statement showing actual rate.
Foreign: Best Practices

- Use per diem
- Daily detailed itinerary
- Use Oanda for all conversions
- Include a business purpose for all supplies
- Do not use average for currency conversion
- When paying for services complete and upload “Receipts for Services” form
TO TIP OR NOT TO TIP
WILL I BE REIMBURSED?

Tip on Meals

Tip on Transportation (shuttle, taxis, hotel staff)
Proof of Payment

Per Diem !!!!
Taxi to PDX airport ($40 /one way)
Parking at PDX airport ($10/day max)
Taxi Out of State $75 or under
Misc. expense $25 or under

No Receipt Needed

Conference rate exception
Conference registration

Receipt Needed
Moving

Types of Moving Expenses
- Taxable
- Non-Taxable

Relevant Documents
- Original, itemized receipts
- Proof of payment
- Letter of offer
- 50 mile test
Moving: Taxable

House Hunting
- Transportation between new and old locations
- Transportation in vicinity of new location
- Lodging

Temporary Living

Meals

Mileage
36.5 cents/mile

Miscellaneous
Closing costs, utility hookup, etc.
Moving: Non Taxable

- Moving company or van rental (if over 50 miles)
- Storage for first 30 days
- 17 cents/mile
- Lodging non-taxable (if over 50 miles)
Moving: Letter of Offer

Letter must be attached to moving reimbursement.

(Cannot be email / phone conversation / sticky note)

Must have $ amount stated in letter of offer.
If not, supplemental letter of offer needed.
Helpful Resources

All found on UFS website
• Oanda-currency conversion
• PSU Signature sheet
• Per diem rates
• Moving expenses matrix
• PSU Travel Policy
• Mileage chart
• Travel Summary
• Direct Billing Instructions
• Travel Checklist
We are Here to Help!

Travel email – travel@pdx.edu

Instant messaging – http://www.pdx.edu/financial-services/travel

Cora: alloway@pdx.edu 5-4382

Jarred: jtrapp@pdx.edu 5-2747

Maria: mvk@pdx.edu 5-3733

Beth: king4@pdx.edu 5-9825
NOW...
THE VIKING TRAVEL MODULE
Roles in the Viking Travel Module:

**TRAVELER**

**DELEGATE**
(if needed)

Once the TA/TR is approved by the traveler, the form will go to...
The DAS (Department Administration Staff)

NOTE:
If a grant is used for funding, a PI and DRA will also need to approve BEFORE The department reviewer.