

IRA Travel Claim Checklist

All claims must be fully complete and submitted within 21 days of return date. Anything beyond the 21 days will require a justification on why it was submitted late.

- Travel Application for Travel Advance must be submitted **3 weeks prior to departure date**
- Travel Expense Claim needs to be separated by dates! Do **not** use lump sum amounts or it will be declined and returned for correction.
- Expenses will need to be charged to the appropriate account numbers.
- Travel Expense Claim - must contain a start and end date on top of the claim per Accounting!
- Provost PreApproval Travel Request is required for a single claim that will go above \$2,500 - **This does not replace the Travel Application nor the Accounting Travel requirements. This form only applies to the Division of Academic Affairs.**
- Provost PreApproval Travel Request is required for **ALL** international travel
- Travel Claim must contain a full name, valid residential address, and student ID number along with the Position information
- Purpose of Trip is required by the University - please make sure you provide this information on claim or on the spreadsheet of expenses
- Spreadsheet of expenses broken down
- List of student names and ID numbers
- Hotel itemized receipt/s that contains the names of the students who stayed in the room
- Flier of the event that contains dates and location
- Driving Certificate/s - must be attached if asking for fuel, rental vehicle and mileage expenses. Only applicable for students who are requesting fuel & mileage reimbursement.
- Fuel receipts must be actual fuel receipts
NO PICTURES OF GAS PUMPS ARE ACCEPTED
- Rental vehicle invoice/receipts must be attached to the claim with the name of the person who rented the vehicle.
- Justification for anyone who drove a vehicle that was not under their name is required if this applies to one of your claims
- Google map - required for those who are asking for mileage reimbursement
- Justification if claim is past the 21 days allowed by IRA
- Volunteer for Clubs - make sure the volunteer is active in HR

For International Trips:

Travel Expenses must be in U.S. dollars. The rate of exchange must be attached to the Travel Claim, or bank statement copies showing the US dollars paid.

Descriptions must be written on each individual receipt if the receipts are in a foreign language.

Quick Notes:

* **Travel the most economic way!**

* **Group Leader:** the designated group leader will be responsible for submitting the travel claim with all incurred expenses for reimbursement. They will be tasked with collecting all receipts related to the trip of acceptable expenses. Once the travel claim has been reimbursed to the group leader is it their responsibility to oversee the reimbursement process for all students involved in the travel.

* **Faculty/Staff expenses** incurred in the Group Trip, must stay in the same claim, but separated by different chartfields as IRA does not cover Faculty or Staff expenses. If Faculty/Staff are using Foundation funds to cover their expenses, then you must provide the **Foundation Payment Authorization** form on the claim. You do not need to provide any backup documentation that was submitted to Foundation.

* **Expenses outside the business dates will not be reimbursed without a written justification.**

* **PLEASE NOTE:** You can not claim both reimbursement for rental vehicle and private vehicle mileage in the same trip/claim.

Travel FAQ's

Q: Can I claim reimbursement for mileage and gas expenses?

A: No, IRA will reimburse mileage expenses if driving your own vehicle, and will reimburse gas if driving a rental vehicle.

Q: We have multiple travelers attending the conference, can each one pay for their own flight and one person submits a travel claim for the entire group?

A: For Group Travel, the group leader is responsible for collecting receipts, submitting the travel claim and reimbursing the student/s for their expenses.

Q: Can IRA cover meals?

A: At this time, IRA can not cover meals

Q: If the student who is traveling does not have funds to pay for their trip, can I just purchase it for them?

A: No, the student would need to incur their own expenses unless the group leader is the one traveling with the entire group. The student may also work with the Department Admin Assistant to book flights/hotels with Travel Shoppe (student travel vendor)!

Q: Are hotel itemized receipts required?

A: Yes, the University requires hotel itemized receipts. If the hotel receipt shows only one name, and it is not the student/s name, you must write the student/s name on top of each hotel receipt.

Q: Do you require a flier for each claim/Direct Pay?

A: Yes, the University requires a flier/agenda and or daily schedule with the details of the conference location and dates.

Q: Would a club that incurs all travel expenses, submit a travel claim?

A: No, Clubs that incur all travel expenses must submit a Direct Pay. Do not submit a travel claim to pay clubs as it will be declined and sent back.

Q: Do you require a driving certificate for mileage and or rental vehicle and gas reimbursement?

A: Yes, per IRA policy, you must complete the [Defensive Driving Course](#) if you will be asking for mileage and or rental vehicle reimbursement.

Q: Can I book any hotel room regardless of cost?

A: No, the Universities maximum lodging rate is \$333 per night. If the lodging is greater than \$333 per night, then you must submit a Provost approval for exceeding the \$333 per night limit.

Q: Can I rent a vehicle from any vendor?

A: No, the University approved vendors for rental vehicles are Enterprise and National. If you rent a vehicle outside of these approved vendors, then a justification must be provided with your claim.

Q: Who submits the Travel Claims/Direct Pay for the University Club Volunteers?

A: If the University Volunteer is active in HR and is responsible for the club and incurring all expenses, then they are responsible for submitting and completing the Travel Claim or Direct Pay.

Q: If we have a student who applied for IRA and has now graduated from the University, are they still eligible to use IRA funds?

A: No, IRA policy states that once the student has graduated from Fresno State, then they are no longer eligible to utilize IRA funds.

Q: What documents do I need to claim vehicle rental reimbursement?

A: You will need to attach your Driving Certificate, Rental Vehicle paid invoice from approved vendor, and gas receipts for the rental vehicle.

Q: What documents do I need to claim private vehicle mileage?

A: You will need to attach a google map with the address information and a Driving Certificate.

Q: If we purchase travel insurance or upgrades, can those be reimbursed?

A: No, per University policy, travel insurance and or upgrades are not reimbursable.

Q: How does the Travel Advance work?

A: You will need to submit a completed travel application 3 weeks prior to departure date, and in this form, you will ask for the travel advance. You will need to attach backup documentation that supports your travel advance request. Travel Advances are not provided unless there is a backup document that supports the total amount you are requesting to be advanced to you. You will need to submit the travel application to ARO through AdobeSign at aro@mail.fresnostate.edu as the **Acceptor** and we will forward to Accounting to process the advance.

Q: How soon can I receive my travel advance?

A: The earliest you can receive your travel advance is 10 days prior to departure date.

Q: Where do I submit my IRA reimbursements and or documentation?

A: You will need to submit it to ARO through AdobeSign at aro@mail.fresnostate.edu as the Acceptor. We will then retain a secondary approval and send it to Accounting for processing.