



CSURMA

POLICY AND PROCEDURE NO. 17

ADOPTED: March 22, 2013
EFFECTIVE: March 22, 2013
SUBJECT: TRAVEL REIMBURSEMENT

PURPOSE:

This Policy and Procedure is intended to formalize the prior existing practices of CSURMA.

POLICY:

It is the policy of the CSURMA that reasonable and actual expenses incurred by AUTHORIZED TRAVELERS for COVERED PURPOSES related to operation of CSURMA's programs shall be reimbursed. The method of approving travel, and reporting and calculating the reimbursable amount shall be in accordance with the travel reimbursement policy of the California State University or the AUTHORIZED TRAVELER'S member auxiliary organization at the time of the travel. The AORMA Committee may adopt more a more specific travel reimbursement policy and procedure for travel related to the AORMA programs.

PROCEDURE:

1. Reimbursement requests will be reported on the AUTHORIZED TRAVELER'S completed State of California – Travel Expense Claim form. The claim form may be forwarded to the AUHORIZED TRAVELER's member accounting department for reimbursement or sent to the CSU Systemwide Office of Risk Management for processing. If the AUTHORIZED TRAVELER is reimbursed by the member's accounting department, that member may then seek reimbursement from CSURMA.
2. The member's accounting department should send the following documents to CSURMA c/o the Systemwide Office of Risk Management:
 - a) Invoices for all reasonable expenses
 - b) Completed State of California – Travel Expense Claim form
 - c) Documentation of the purpose of the travel such as a copy of the agenda, presentation, etc. for the COVERED PURPOSE that the COVERED TRAVELER attended.
3. The CSURMA Secretary-Auditor or designee shall then process the reimbursement request in the manner of other CSURMA payment requests.



DEFINITIONS:

AUTHORIZED TRAVELERS – includes CSURMA Executive Committee members and officers, standing committee members and participants in duly established task groups. Other persons, including University personnel traveling on CSURMA related travel shall be reimbursed pursuant to this P&P No. 17 as agreed under separate agreement in advance of the travel. Independent consultants shall not be considered **AUTHORIZED TRAVELERS** under this P&P No. 17 and any travel expenses incurred by independent consultants may be reimbursed as provided under separate consulting agreements.

COVERED EXPENSES – includes reasonable expenses incurred by the **AUTHORIZED TRAVELER** as provided under the travel reimbursement policy of the California State University.

COVERED PURPOSES – covered purposes shall include attendance at meetings of the CSURMA Executive Committee, standing committees, task group meetings, program presentations, member meetings, approved professional development trainings and other travel approved for University personnel. Any other **COVERED PURPOSES** must be approved for reimbursement by the Executive Committee. Travel to CSURMA Board of Directors Meetings is not a covered purpose. If there is travel to an event that would otherwise be a **COVERED PURPOSE** in conjunction with another event the **AUTHORIZED TRAVELER** would otherwise attend, such as a CSURMA Board of Directors meeting or the CSURMA Fitting the Pieces Together Conference, the **AUTHORIZED TRAVELER** is eligible for reimbursement of **COVERED EXPENSES** to attend the **COVERED PURPOSE** meeting only and there will be no CSURMA reimbursement of the expenses the **AUTHORIZED TRAVELER** would have normally incurred to attend the CSURMA Board of Directors Meeting or the CSURMA Fitting the Pieces Together Conference.