

## TRAVELER CHECKLIST

### Before your trip

- Approval:** Receive verbal approval from supervisor for travel request.
- CUNYFirst Access:** Make sure you have CUNYFirst travel and expense access.
- T-Card Request:** Request an SPS issued travel card (T-Card) if you would prefer to use one for your travel expenses. T-Cards can only be used for the cardholder's preapproved travel expenses.
- T-Card Pick-up:** If the Business Office is in possession of your T-Card, contact [Accounts Payable](#) to schedule a day and time to pick up card. If you have the T-card in your possession, contact Accounts Payable to request to have the card limit increased to cover the cost of travel arrangements.
- CUNY Travel Policy** – Read and sign the travel policy. Email signed form/page to [Accounts Payable](#) Note: One signed form covers all future SPS travels.
- Concur** – Register and create an account with Concur to book transportation and hotel or contact the businesses directly. It has been beneficial to inform the hotel that you are a state employee on a business trip and am asking them to honor the state's per diem rate. If you are unable to secure a hotel room within the per diem rate, contact [Accounts Payable](#) immediately so that a request to exceed the per diem rate can be submitted to the Associate Dean of Administration and Finance before the trip begins.
- Travel Authorization (TA):** Create a TA in CUNYFirst and ensure it is fully approved at least 6 weeks prior to your trip.
- Funding Request Form** – The Funding Request Form is required if the employee is requesting that SPS make the payment for their conference registration or for an institutional membership (**individual memberships are not permitted**). Complete the funding request form including all required signatures and then email the completed form to [Purchasing@sps.cuny.edu](mailto:Purchasing@sps.cuny.edu)

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## After your trip

- ❑ **Receipts:** Forward receipts, proof of payment, conference agenda/flier, and other backup documentation to [accountspayable@sps.cuny.edu](mailto:accountspayable@sps.cuny.edu) Please ensure the receipts are legible.
- ❑ **Conference Registration Fees:** Provide confirmation receipt, proof of payment and conference agenda.
- ❑ **Commercial Air Travel:** Provide original boarding pass with paid receipt or email confirmation including name, dates, time, destination, and proof of payment. Document must show the ticket number.
- ❑ **Additional Airline Fee (baggage fees):** Provide original paid receipt.
- ❑ **Receipted Lodging (hotel):** Provide original checkout bill with name, date, and detailed charges. Ensure the nightly rate is within the [GSA](#) per diem. If the per diem rate exceeds the GSA rate, submit the approved overage memo signed by the Associate Dean of Administration and Finance.
- ❑ **Per Diem Breakfast/Dinner (meals):** Receipts are not required. Lunch is not reimbursable. Per diems will be reduced or removed for conferences that provide meals. Departing for trip one hour before regular work start time entitles breakfast. Arriving home from trip two hours after regular work start time entitles dinner.
- ❑ **Transportation (bus, train, car):** Provide original paid receipt. If a personal vehicle was used to get to the conference location, provide a Google Map printout of directions (including miles) from your home address to the conference location.
- ❑ **Taxi:** Provide original paid receipt. Taxi is only allowed for travel between home, airport, and conference hotel. Tips are allowable for 20% or less of taxi fare. Document must show to and from addresses.
- ❑ **T-Card options:** Return your T-card to the Business Office upon return of your travel. Or keep the T-card and the card limit will be decreased until your next travel.

When submitting your receipts and documents include the following information within your email body.

- What are your normal working hours (EX, M-F 9am to 5pm)
- Time you left home to hotel
- Time you left hotel to home

For additional forms and information visit [SPS Accounts Payable and Purchasing](#)

Questions? Contact [accountspayable@sps.cuny.edu](mailto:accountspayable@sps.cuny.edu)

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