

Multi-State Travel - FAQs

1. What is considered Multi-State Travel (project and committee travel)?

Multi-State Travel is usually a trip that a registered participant takes to attend the authorized annual meeting of their Multi-State research project or Multi-State committee group.

2. If the registered participant cannot attend, can someone else go in their place?

The participant is usually the Program Director (PD) or designated WSU representative and MUST be currently registered on the project or committee. If an exception is requested for another to attend in their place, then one of the following rules will apply:

1. Another currently registered participant can attend without ANY additional special request to COR, other than the usual TA with a comment that they have been given the approval to attend the meeting by the PD and will be authorized to use the project budget for their expenses.
2. If the traveler is NOT a registered participant, approval MUST be made by COR/Extension administration in writing, preferably by email (sometimes a graduate student will be attending to do a presentation on behalf of the PD). It may be in the best interest of the traveler to join the project officially if they are faculty and may be contributing in the future or need a COR project for funding.

Exceptions to this policy MUST be reviewed and approved in writing by the Director of the COR; and if an Extension appointment is involved, by the Director or Associate Director of WSU Extension. Please review the Travel Memorandum for additional procedural information.

3. What if more than one participant wants to attend the meeting?

More than one participant can attend the meeting, but only one will have their travel expenses reimbursed by the COR. The other participant(s) MUST find funding from other sources in their own department or grants. The TAs should specify which traveler has been designated as the Multi-State participant for COR funds.

4. How do I get a participant registered on a project so they can go to the annual meeting?

Submit a participant's Appendix E (signed first by their Dept. Chair or Director) to the COR for approval of their addition by the Director. If the participant also has ANY portion of their appointment with Extension, then the Extension Director MUST also sign. The participant MUST have a completed Appendix E in the NIMSS system and a TA sent to COR BEFORE funds will be authorized for their travel. If the TA comes in at the same time as the TEV, expenses will be reimbursed at the discretion of the Director.

5. What Multi-state events are paid for by COR/Extension?

The Multi-State event that is most often paid for by COR/Extension is the authorized annual meeting for the group. On occasion (with prior approval from COR/Extension) funds may be authorized for a participant to attend a meeting to produce a publication or a rewrite/revision of the current project or committee.

6. Where can I find the most current Travel Policies?

There is a copy of the most current Multi-State travel policies on the COR website at: <http://cahnr.wsu.edu/researchh/grant-resources/reeport-instructions/hatch-multi-state/>. In your department, there should also be a printed copy of the Memorandum that is emailed every year for your records in August, along with ANY updates throughout the year.

7. How am I able to use the project's budget if it shows as overdrawn for the travel expenses?

It may be possible that the project budget and/or Extension operating budget becomes overdrawn for Multi-State travel expenses. However, these expenses are reimbursed at the end of the quarter by COR/Extension up to the maximum reimbursement amount (currently \$1,200.00) through a journal voucher entry. You need to use the project budget so we can show that Multi-State monies are being used on behalf of the program. ANY expenses over the maximum remain as an expense on the budget, so it still may show some negative amount if NO additional funds are allocated.

8. How do I do the TA (budget numbers, travel dates, exceptions, annual leave, current with paperwork for project, foreign travel) for a Multi-State trip?

When completing the TA to request approval for Multi-State Travel and request COR/Extension funding, the Department or Business Center should check the following items before sending it to COR:

- A. Is the participant registered on the project and has their progress reports for current projects or REEport reports for new projects done so they can go?
- B. Check the participant's appointments to determine the percentages of Teaching, Research, and Extension they have.
- C. Be sure to list the correct project number in the Account Section – and the Extension Budget number 09A-4101-0012 as well if there is a percentage of their appointment with Extension. Call COR if you are NOT sure which budget to use.
- D. Travel dates can be listed as one day before and one day after the meeting.
- E. If they have another professional meeting in conjunction with Multi-State, be sure to list that in comments. Include a statement of which expenses will be charged against the other meeting and be sure to list the other meeting's budget. Give details of ANY exceptions: Personal leave around the meeting times, the request of a rental car, registration to be paid on the TEV (along with the registration paperwork) and accommodation details if something is unusual.
- F. Have the Department Chair sign before sending it on to COR. When COR receives the TA, it will be signed by COR and Extension if needed and sent back to your department. We can then work on purchasing other travel items such as tickets and registration.

9. How does COR pay airline charges for me and determine airfare reimbursement?

The best procedure is to have COR purchase the itinerary you work out with a WSU approved travel agency. (This only happens after the TA is submitted and signed by the COR Director.) The agent can call Ellen Yeates directly at 509-335-4563 and it will be charged to the COR CTA account. Through PaymentNet, it will be split out accordingly to all applicable budgets in the correct percentages as listed on the TA. It also helps the departments especially if COR is responsible for all the expenses of an annual Multi-State Committee instead of an annual Research Project meeting.

COR will pay for travel to and from the Multi-State event but additional travel, as it applies to another meeting, will be charged to that meeting or NOT reimbursed if it applies to personal leave— for example: rental car or another plane ticket or an additional leg of a flight. Flight reimbursement will be calculated as roundtrip from the Multi-State meeting location. Additional documentation from the travel agent may be required to make the determination if other legs of travel have been purchased at the same time for another meeting. The travel agent should produce a simulated itinerary with the pricing for the basic roundtrip without the additional legs for another meeting or personal trip.

10. How are Multi-State TEV's completed (receipts, explanations, per diem rates, signatures)?

Use your signed TA copy that I return to you as a guide in completing the TEV. This will have the most accurate information if changes were made at COR after you sent it in for signatures. You will especially need to refer to the account numbers and the percentages charged to each account. Also check on the distribution of expenses if another meeting or personal leave needs to be taken out of the Multi-State calculations. Look in the Exceptions area for additional comments that can affect the way monies are split – including subtracting out personal expenses for annual leave. Include another budget number as needed if expenses (including pre-purchased items such as airfare and registration) will go over the maximum reimbursement amount and you want some other account other than the project budget to pick up the remainder.

Be sure to double-check the per diem rates for each city where meals are claimed. Alaska and Hawaii are unusual and use a foreign rate classification. If you are NOT sure, please call the Travel Dept. or COR for help in determining rates. (For foreign meals, be sure to add the meals and incidentals amounts together for the total meal rate before applying the percentages for each meal: 25% Breakfast, 30% lunch, 45% for dinner.

Reimbursement from COR/Extension for Multi-State travel per trip at this time will NOT exceed \$1,200. This includes ANY expenses that have been prepaid for the participant that does NOT show on the TEV such as airline ticketing and registration fees.

Signatures are needed by the traveler and the Department Chair before submitting to COR for review and signature approval. It is very important to get the TEV processed within 10 days of the trip – otherwise, you may miss the reimbursement date for that quarter or NOT get reimbursed at all if it misses the fiscal year end. The COR sends out reminders as the end of the quarter nears for ANY trip that has been authorized but expenses NOT submitted. If cut-off dates are missed or the TEV is very late in being submitted, the COR/Extension Directors may choose NOT to authorize reimbursement. It is up to each department to encourage their participants to turn in their receipts in a timely manner to process the paperwork. This is especially true at the end of the fiscal year.

11. The participant is claiming an exact amount for food instead of the per diem amount. Which rate should I use?

If the amount is lower than the per diem rate, ask your participant if they are sure they want to under-claim. If they want to claim more than the per diem rate (even if they produce the receipts) they will only be paid the per diem rate for that area. Put a notation in the "Travel Details" area of the TEV to explain that actual meal expenses are claimed if under the per diem amount for that area.

12. When do I get the money back in my COR project budget?

You receive copies back of the signed TA and TEV as they are processed. Your monthly budget pages will show charges for airlines, etc. as we go. Please compare your calculations with mine. When you receive the reimbursement memo at the end of the quarter, I show the participant and the combined amount being reimbursed for Cost (per diem) and Airfare (including ticketing fees) as they apply to your project budget. Call immediately if your amounts differ and we can work it out. Sometimes Travel makes an adjustment in an item on the TEV.

Reimbursements are paid at the end of each quarter:

July-Aug-Sept 1st Quarter travel is reimbursed the first part of October

Oct-Nov-Dec 2nd Quarter travel - the first part of January

Jan-Feb-Mar 3rd Quarter travel - the first part of April

Apr-May-Jun 4th Quarter travel - the first part of July – before the fiscal year cutoff.

13. What if the department had already made purchases on an administration or other budget for expenses before the TA was authorized for the trip with the correct accounts to use?

This can be avoided if the correct procedures are followed from the beginning in getting authorization for the trip to be taken at all. However, if this does happen for some reason, please give COR a call and we can determine the best procedure.

Most times, if the accounts are within your own department, (administration budget to a project budget) you can shift the expenses to the correct budget by processing an ETR without getting COR involved. If the expenses will be for Multi-State Committee trip, the COR Multi-State budget is involved and the ETR will need to be sent here for signature that we agree to accept the charges – please call to verify the correct COR account to designate for the transfer. From there, the correct budget can be reimbursed by COR.

Please note that only 10A accounts for COR and 09A accounts for Extension can be reimbursed on behalf of COR/Extension.

14. Can the ticket be purchased on a traveler's WSU corporate card and be reimbursed?

Yes, just include the documentation with the TEV and show the cost in the "Other Expenses" section of the TEV. For your review, the following applies to the Card:

The WSU Travel Charge Card is a personal liability Visa card issued to WSU employees to be used for payment of expense incurred while traveling on behalf of WSU.

Allowable Purchases: Lodging, Meals, Rental Cars, and Airfare through a GA approved travel agency or directly from an airline.

Prohibited Purchases Include: Personal Items, Non-Official Travel Related Items (Room service, alcoholic purchases, etc...), and Non-Business Related Telephone Calls

What are the Benefits of Having a WSU Travel Charge Card?: Travelers have the ability to secure reservations, NO need to use personal funds for WSU travel expenses, eliminates the need for travel advances, allows travelers to make on the spot travel related purchases, and eliminates the need to have a Budget Rental Card to secure rental cars.

15. What are some things NOT to do.

Taking a Trip:

A participant should NOT go on a Multi-State trip without first getting a TA authorized to pay for expenses when they return (if they want reimbursement by COR). At this point, the COR is under NO obligation to reimburse expenses and the TEV will be flagged for special consideration by the COR/Extension Directors to decide if reimbursement will be given.

First class tickets are NOT approved. Only use U.S. Carriers for airline travel unless situation does NOT offer U.S. transport (travel within a foreign country).

Do NOT stay at a non-headquarters hotel at higher rates without explanation. Travel requires paperwork showing that it was the best available published rate (you can use copies of internet pages) before it is decided that it is reimbursable at above per diem rates. Also, if proximity to the main hotel is still more cost effective than travel expenses to and from a less expensive hotel, then list this explanation in the Details area of the TEV.

Do NOT charge personal expenses on WSU travel cards. It is prohibited.

Do NOT wait more than two weeks to submit a TEV

16. May the traveler purchase airfare from personal financial resources?

Yes. When a traveler is billed individually and seeks reimbursement for purchase of airfare, the traveler MUST attach receipts to the Travel Expense Voucher.

17. For other questions, please contact the COR at 509-335-4563, eyeates@wsu.edu