DLF Procedures for Faculty Development Conferences/Travel
*Note that URLs indicated below may change as CSM rolls out the new website in September 2015

Checklist (The three "R" forms)
Review the CSM Travel Policy and these DLF Procedures. Details about each step follow this checklist.

1. In order to estimate your expenses correctly, go to GSA Per Diem website to find your maximum per diem meal rate for the destination city/state.
2. Complete the DLF form, Request for Faculty Development Conference Funding ("**Request Form**"). This form is completed and submitted online.
3. DLF will send an email indicating whether your request was approved, the amount of funding, and any restrictions. If your request is approved, complete the form attached in the email -- DLF Travel Reimbursement Registration Form ("**Registration Form**"). This is a PDF form. Return the form to DLF for processing.
4. Gather and organize your original receipts. Complete the DLF form, Faculty Development Expense Reimbursement Form ("**Reimbursement Form**"). This is a PDF form. Submit the Reimbursement Form, along with your original receipts, to DLF. All expenses must be submitted within 30 days of travel. You can submit this form more than once if you want quicker reimbursement.

DLF will review, approve, and process your Reimbursement Form and original receipts.   DLF will enter the information for you in the new CSM "Works" online system. Procurement/AP will process a reimbursement check.

Step 1: CSM Travel Policy and DLF Procedures
CSM adopted a new Travel Policy on July 1, 2015. It requires employees to use a new online reimbursement system, called Works. DLF worked with DFS to streamline the procedures for faculty and adjuncts traveling for DLF approved conferences.

*   Review the CSM Travel Policy. It is available in the Online Administrative Manual as FM2500, Travel. The current URL is http://www.csmd.edu/Faculty/AdminManual/
*   Note that paragraph 2 of the Travel Policy states that employees use the Web based Bank of American Expense Reimbursement Program (called Works). Faculty/Adjuncts will NOT use this system for DLF approved travel. Paragraph 10 states that employees need to scan original receipts into Works. Faculty/Adjuncts must submit original receipts to DLF with the Reimbursement Form. DLF will then scan approved receipts into Works.
*   For a summary of the CSM Travel Policy, see the end of this document. This will help you estimate your expenses.

Step 2: Meal Per Diem Rates
*   CSM meal reimbursement rate is set at a maximum of $74 per day. However, the CSM Travel Policy requires employees to research the U.S. General Services Administrative Services ("GSA") per diem rate. Employees are required to use the lowest per diem rate.
*   Go to http://www.gsa.gov/portal/category/104711, enter your destination city/state, and click the "Find Per Diem Rate" button. You need to do this even if you are traveling within Maryland.
*   Note that the GSA average is $46 per day for meals and incidentals. This is broken down as follows: breakfast at $7, lunch at $11, dinner at $23, and incidentals at $5. However, your destination city/state may be higher than the GSA average. For example, the Meals Per Diem for Philadelphia, PA is $66. See the screen shot from GSA below.

Figure 1: GSA Per Diem Rate, FY 2015

The following rates apply for **Philadelphia , Pennsylvania**															
Primary Destination* (1)	**County (2, 3)**	**Max lodging by Month (excluding taxes)**													**Meals & Inc. Exp.****
		2014			**2015**										
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Philadelphia	Philadelphia	166	166	139	139	139	171	171	171	171	142	142	166	66

Step 3: Request for Faculty Development Conference Funding

- Complete the DLF form, Request for Faculty Development Conference Funding ("Request Form").
- This web form is completed and submitted online. It is currently at the DLF website -- http://www.csmd.edu/dlf/.
- When you submit this form, DLF is automatically notified.
- DLF reviews Request Forms each week. You will be sent an email indicating whether your request was approved. If the request is approved, the email will contain the maximum amount of funding and any restrictions. The email will also contain the Registration form required in Step 4.

Step 4: DLF Travel Reimbursement Registration Form

- This form is based on the CSM form; however, it was adapted for DLF.
- It is a PDF form. You can open the form in Adobe Reader or Acrobat and type the required fields. (You can also print a blank form and hand-write the information in the required fields.)
- Note that you only have to complete this form once, as it is used to register you in Works.
- Complete the form and return to DLF. Your signature is required. Therefore, you can hand-deliver or send through inter-department mail. You can also use one of Xerox machines to scan, save as a PDF, and email it to DLF (KStevens1@csmd.edu).

Figure 2: DLF Travel Reimbursement Registration Form

Step 5:   Faculty Development Expense Reimbursement Form
- Note that CSM is no longer authorizing travel advances.
- CSM is no longer using the "old" Expense Reimbursement form. This new DLF form is, hopefully, more user-friendly! It mirrors the information you submitted in the Request Form.
- The Reimbursement Form is a PDF form. You can open it in Adobe Reader or Acrobat, and type the required fields. (You can also print a blank form and hand-write the information in the required fields.)
- If you have a large expense up front (e.g., airfare), you can submit this form after you incur the expense. You can then submit another form after your conference.
- Please organize your receipts according to the Reimbursement Form. For example, include all original receipts for meals by day.
- Complete the form and return to DLF. Your signature and original receipts are required. Therefore, hand-deliver or send through inter-department mail.
- A sample-completed form is included at the end of this document. It also includes instructions on how to include verification for mileage.

Step 6: Reimbursement
- DLF will review, approve, and process the Reimbursement Form. Note that in many cases, the reimbursement amount is adjusted to ensure that the submitted expenses comply with the CSM Travel Policy.
- DLF will then enter the information for you in the new CSM "Works" online system.
- Procurement/Accounts Payable sweeps Works and cuts checks twice per week.

Summary of the CSM Travel Policy
In general, all receipts must be detailed to include the vender name, date, time, itemized list of items, and payment confirmation.

Hotel
- CSM reimburses room charges and taxes.
- If you stay in Maryland, contact Procurement to get a copy of CSM's Sales Tax Exemption Certificate. You should not pay sales tax for Maryland lodging.
- Check to see if the hotel offers reduced rates for the conference.
- Personal expenses (e.g., movies) will not be reimbursed.
- If you charge a meal to your room, you must include the original receipt. The hotel bill is not sufficient, as it does not show the specific charges. See Meals below.

Transportation to/from Conference - Air/Train/Bus
- Find the lowest fare.
- Use coach or economy.

Transportation to/from Conference - Personal Vehicle
- If the roundtrip is 400 miles or less, consider using a CSM vehicle.
- Personal vehicles can be used if (1) the round trip is 400 miles or less, and (2) it is the most economical option. You are reimbursed at the standard rate of $0.50 per mile. (Gas is not reimbursed separately.)
- If the roundtrip is 401 miles or more, you must request advance approval. Approval is based on the most economical option or exceptional circumstances.

Transportation to/from Conference - Rental Cars
- Rental cars are limited to situations where other modes of transportation are too expensive.
- Review the CSM Travel Policy to ensure you meet all the requirements.

Mileage
- You can be reimbursed for mileage to/from the airport, train station, or bus station.
- You can be reimbursed for mileage during the conference if you are using your personal vehicle.
- The CSM reimbursement rate is $0.50 per mile.
- For mileage, calculate your one-way mileage from your CSM Primary Campus using MapQuest Route Planner to find the shortest route (http://www.mapquest.com/routeplanner/) or Yahoo Maps - Directions. Print the page (or take a screen shot and print) that clearly shows the one-way mileage. See the Sample at the end of this document for an example.

Meals
- Original receipts should contain the day, time, and itemized list of purchases.
- Tips should be included on the receipt(s). Tips are reimbursed up to a maximum of 20%. Note that tips are included as part of your per diem rate.
- On the day of departure, meals are limited to lunch and dinner, unless you are required to leave before 8:00 a.m.
- On the day of return, meals are limited to breakfast and lunch, unless you are required to return later than 6:00 p.m.
- Try to have only one person per receipt. If the receipt includes two meals, circle the amount that applies to you.
- Note that you cannot claim expenses for others.
- If you order room service, be sure to get and submit the itemized receipt. The total on the hotel bill is not sufficient.
- Sales tax on meals is reimbursable.
- Alcohol purchases are not reimbursed.
- Incidental expenses (tips/fees for porters, baggage carriers) are limited to $5 per day per GSA per diem rate. These expenses are included in your per diem rate.

Sample - Completed Faculty Development Expense Reimbursement Form
See next two pages. This is a sample of a completed Reimbursement form. The traveler entered the data that is bolded.

A sample verification for mileage is also included on the third page. This shows mileage documentation that complies with the CSM Travel Policy.

Faculty Development Expense Reimbursement Form - SAMPLE

Complete and submit this form for DLF approved faculty development workshops/conferences. Include all original receipts with this form. Be sure to review the DLF Procedures and CSM Travel Policy.

NOTE - For mileage, calculate your one-way mileage from your CSM Primary Campus using MapQuest Route Planner to find the shortest route (http://www.mapquest.com/routeplanner/) or Yahoo Maps - Directions. Print the page (or take a screen shot and print) that clearly shows the one-way mileage.

1. General Information

Last Name	**Morris**
First Name	**Daphne**
College ID (This can be found at Online Services > Faculty > What's my student/staff ID?)	**0234567**
Employee Type - Select one	☒**Full-time Faculty** ☐Adjunct Faculty ☐Staff
Division (Type the CSM abbreviation (e.g., CAH))	**BAT**
Primary Campus - Select one	☒**10 LAPL/WALD** ☐20 PRIN ☐30 LEON
Groupwise Email	**DaphneM@csmd.edu**
Phone #	**301-934-7596**
Conference Name	**eLearning & Teaching Conference**
City, State of Conference	**Pittsburg, PA**
DLF Reference # (to be added by DLF)	

2. AFACCT Conference

If this expense reimbursement is for AFACCT, enter the information below and continue with section 10 (Total All Expenses). If not, see the next section.

Type	Details by Date or Miles	Total Amount
AFACCT Mileage - Enter the total roundtrip miles and the total amount (miles x $0.50)		
AFACCT Lodging - Enter hotel cost for 1 night		

3. Conference/Travel Dates

Departure Date	**9/01/2015**
Return Date	**9/04/2015**

4. Conference/Registration Fee

Type	Details	Total Amount
Registration Fee		**250.00**
Certification Fee		
Other Related fee		

5. Transportation to and from Conference

Type	Details by Date (or Miles)	Total Amount
☒Air ☐Train ☐Bus ☐Car Rental ☐Personal Car	**$125 one way + tax x 2**	**268.52**
Mileage to and from Airport/Train/Bus- Use the standard mileage reimbursement of $0.50 per mile	**La Plata to Dulles 29.2 miles**	**29.20**
Parking Fee(s)	**3 days @ $30 and 1 day @ $15**	**45.00**

6. Transportation during Conference

Type	Details by Date (or Mileage)	Total Amount
Amount of transportation during conference For example, fare(s) for metro, taxi, or bus	**Taxi to/from airport @ 10 + 20% tip**	**24.00**

7. Lodging

Type	Details by Date	Total Amount
Amount for Lodging	**$132.52 per night x 3 nights**	**397.56**

8. Meals

To determine the maximum reimbursement for meals, go to http://www.gsa.gov/portal/category/104711
Select the city and state to get the per diem rate. Enter the rate below.

Meals Per Diem per GSA:		$71	
Date	Breakfast, Lunch, or Dinner	Restaurant Name	Amount
9/1/2015	**Lunch**	**Arby's**	**10.26**
	Dinner	**Green Turtle**	**12.36**
9/2/2015	**Breakfast**	**Room Service – Itemized receipt attached (hotel bill is not sufficient)**	**18.46**
	Lunch	**Provided by Conference**	**0.00**
	Dinner	**Room Service – Itemized receipt attached (hotel bill is not sufficient)**	**21.38**
9/3/2015	**Breakfast**	**Provided by Conference**	**0.00**
	Lunch	**Hot Dogs R Us**	**7.56**
	Dinner	**Provided by Conference**	**0.00**
9/4/2015	**Breakfast**	**Dash-n-Go**	**5.43**
		Total Meals:	**75.45**

9. Other

Description	Details by Date	Total Amount

10. Total All Expenses

Provide a total for all expenses

Total	**1,089.73**

11. I certify that this information and original receipts attached are correct and comply with CSM Travel Policy and DLF Procedures.

Faculty/Adjunct Signature:	*Daphne A. Morris*
Date:	**September 15, 2015**

For DLF Use Only

Cost Center Manager Approval (Sign)			
DLF Chair Approval (Sign)			
Account Number		Amount	
Account Number		Amount	
Account Number		Amount	
Date Entered into Works		More Expenses to come?	
Date Accepted in Works		Entered into DLF xlsx	

Sample - Mileage

Go to http://www.mapquest.com/routeplanner/. Enter your primary campus and your destination.
Check next to "Shortest Distance." Note that you can use your residence instead of your primary campus
if it is a shorter distance to the destination.

Figure 1: Sample screen shots of Mapquest
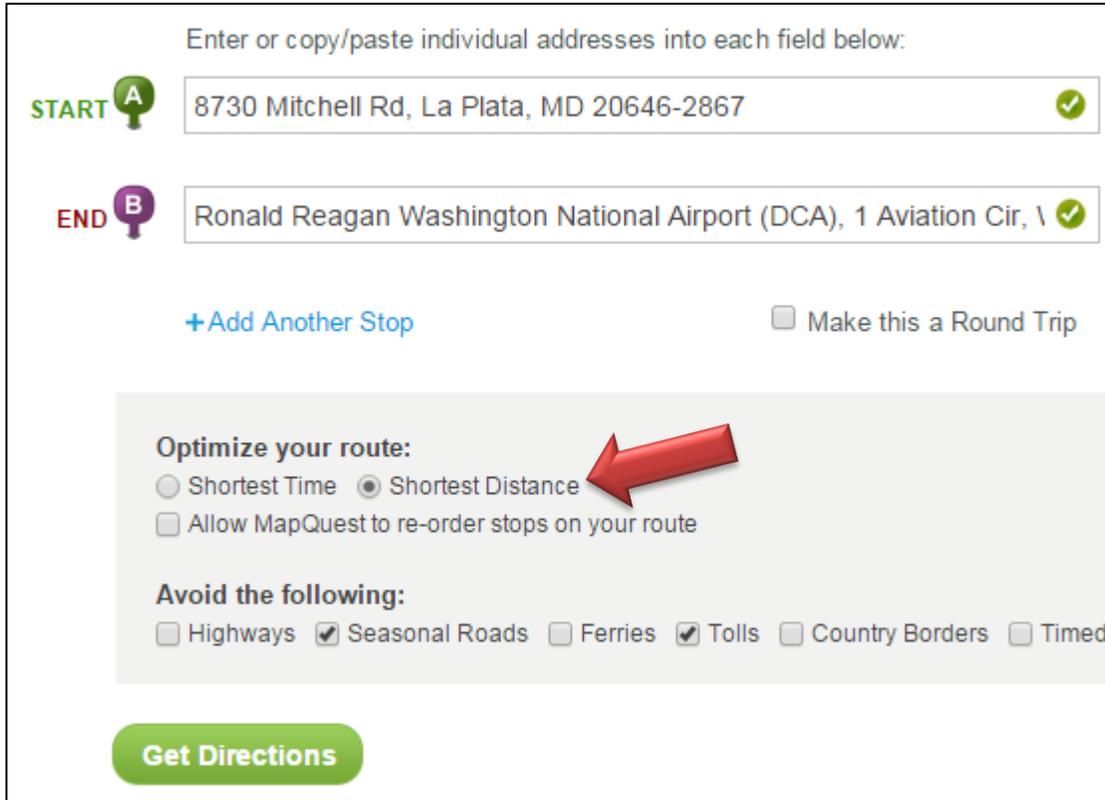
When the results appear, take a screen shot, or use the Snipping tool to show the trip and one-way
mileage. If you print directly from Mapquest, please make sure the mileage clearly shows. Submit this
with your other original receipts.

Figure 2: Mapquest showing one-way mileage