

Poly Travel and Credit Card Quarterly Newsletter

Spring 2025

ProCard News

1. **Submitting ProCard statements is a 3 step process, [click here for monthly due dates](#)**
 - A. Go into PeopleSoft to check if you have a statement.
 - i. If so, update each transaction's description, add justifications, and update chart field strings if necessary. Complete this task by **month end**, since you will not be able to make any changes to the statement in PeopleSoft after this date.
 - ii. If not, no further action is required.
 - B. Print the PeopleSoft statement to PDF, attach ALL required back up (itemized receipts, hospitality forms, etc.) numbered and in order, and route the entire packet for signature to (cardholder, if delegate and) approving official and chart field string approvers.
 - C. Email your accurate, compliant, and approved statement packet to sbs-Payment@calpoly.edu by end of day on the **7th**.

Travel News

- A. **The REAL ID identification card** will be required for domestic travel starting May 7, 2025. Alternative ID's such as a passport or Global Entry card will also be accepted. Visit the Department of Homeland Security for more information [REAL ID FAQs](#).
- B. **International Travel Cautions** - The CSU advises all international travelers to proceed with extreme caution. Immigration policies, practices, travel bans, and health and safety risks are shifting daily and often cannot be fully assessed or projected in advance. For more information visit: [US Department of State – Travel Advisories](#)
- C. **Southwest Baggage policy** – For Southwest reservations booked or changed on or after May 28, 2025, checked baggage fees will apply. Current baggage policies apply for customers traveling on reservations booked prior to May 28, 2025. . For more information and Frequently Asked Questions please [click here](#).

CSU Travel Policy Reminders for Travelers and Approvers.

Below is a list of frequent audit findings. They may require an Expense Report to be sent back for correction, which delays processing time and payment for all reports.

- A. **Enterprise Car Rental should be booked using Concur Travel to ensure rental is on the CSU contract.**
 - a. If approved to book large vehicles, use the Cal Poly [Enterprise website](#) and enter the CSU Account Code (held by department admin). If CSU Account Code is not provided (rental is not on the CSU contract) and insurance will not be included, therefore, the driver will be personally responsible for any accidents or issues with the vehicle.
 - b. San Luis Obispo Enterprise locations will ask travelers for...
 - i. their business email address when picking up your vehicle. This is to ensure they are a current employee and eligible for the CSU contracted rate.
 - ii. their Driver Safety certificate and Cal Poly ID for approved 15-passenger van rentals.
- B. **Add a clear Business Purpose to your Request and Expense Report.**

- a. Add a Comment in the Header or attach a document with the information.
 - b. Requests and Expense Reports without a clear Cal Poly business purpose may be sent back for comments as such.
 - c. The Chancellors Office may reach out to a traveler directly for the business purpose when a comment or document is not added.
- C. International Travel Requests Checklist - NEW (Individual Travelers)**
- a. International travel requests must be submitted at least 60 days before the travel start date.
 - b. Justification is required when submitting a Concur Request less than 60 days before the travel start date.
 - c. A new International Request CHECK LIST is now available on the [travel website](#) for reference.
- D. Local Hospitality and Mileage** – A “Blanket” Expense Report can be created in Concur for local Hospitality or Mileage. You can create a monthly or quarterly Expense Report and submit multiple local hospitality occurrences or mileage expenses together even if they are not for the same event/trip (Example: *February Hosting*). Each Hospitality expense should include an itemized receipt and Hospitality Justification Form.
- a. A Request is not required for Hospitality.
 - b. Hosting limits (Per person, all inclusive): \$30 breakfast, \$60 lunch, \$90 dinner.
- E. Parking Fees**
- a. Some local hotels automatically add Parking Fees to the invoice even if there is not a vehicle (guest travel). Always review local hotel receipts. If this fee was incorrectly added, contact the hotel so they may credit the expense back to your Concur Travel Card. Both the charge and credit will need to be added to your expense report.
- F. Group (students) expenses**
- a. Always attach a roster or add a list of student names for “Team/Group meals” expense type Always add comments for each meal, such as “roster applies to all meal expenses” or explain how many attended each meal. Add the per person average cost to the comment section “\$22 per person.”
 - i. Reminder – Student per diem is \$68 Full Days and \$51 First/Last Day regardless of travel location.
- G. End of Year Deadlines for 100% State Funded Travel** – all submitted reports and claim forms must be accurate, budget and manager approved and submitted to Payment Services (for claim forms) or “In Accounting Review” (for Concur Expense Reports) by the following dates to ensure they are included in this fiscal year’s budget.
Friday, May 2, 2025, for all travel dates prior to May 2nd.
Friday, June 6, 2025, only for travel dates that occur after April 20, 2025.

RESOURCES:

PolyTravel website <https://afd.calpoly.edu/travel/>

Pdf version of newsletters available on website under Travel Updates

PolyTravel resources <https://afd.calpoly.edu/travel/resources/>

including guides for Request, Expense Report, and CHECKLISTS for travelers and approvers

PolyTravel SharePoint Resources <https://cpslo.sharepoint.com/sites/PolyTravelResources>

Including video guides, Checklists & Cheat Sheets (more to come!)

Links to maximum travel per diem allowances for various type of travel by location:

- For Continental US travel, rates set annually by [General Services Administration](#);
- For Alaska, Hawaii, or the US Possessions travel, rates annually set by [Department of Defense](#) (Per Diem, Travel and Transportation Allowance Committee (PDTATAC))
- For International travel, rates set monthly by [Department of State](#)

Contact Us:

ProCard Support

Kevin Hayes – Credit Card Coordinator
Procard@calpoly.edu

Concur General Support

Stephanie Albright – Travel Analyst
polytravel@calpoly.edu

Concur Expense Report Support

Polytravel@calpoly.edu
Conor O’Sullivan – Travel Payment Tech
cposuli@calpoly.edu