Student Organization Travel – if expenses are to be paid from a Ball State student organization FOAPAL

It is recommended that you read through the entire document before submitting any information.

Pre-Approval Report – Prior to the trip, a Pre-Approval Report must be generated in the Travel System, identifying the expected expenses for which the student may be reimbursed:

- Airfare
- Conference Registration
- Meals
- Lodging

For a student organization FOAPAL, the Pre-Approval Report can either be entered by Stacey Myers in the Office of Student Life, smyers@bsu.edu or if your organization is associated with a department, the department’s Administrative Coordinator has the option of entering the Pre-Approval. Instructions below refer to Stacey Myers, but if you are working with a department Administrative Coordinator then it is understood that information will be submitted to the Administrative Coordinator.

Once a Pre-Approval is entered for a student, an email from expense-noreply@chromefile.com will be sent to the student to electronically approve the Pre-Approval. After the Pre-Approval is electronically approved by the student, it will be forwarded to administrative staff for electronic approval.

Expense Report – After the trip, an Expense Report may need to be generated in the Travel System to reimburse actual expenses. The Expense Report must be generated by the same staff member who generated the Pre-Approval Report.

Student Travel Notice – In addition to the Pre-Approval Report, one Student Travel Notice form that includes a list of students and emergency contact information must be completed. This is an electronic form which can be found at SERVICE NOW, then search for ‘Student Travel Notice’. Once you complete and submit the Student Travel Notice, it will go to the appropriate university administration for approval. If the Service Now link in this paragraph is not working, go to www.bsu.edu/studentorganizations, click TRAVEL FORMS, click LOG ONTO SERVICE NOW TO SEARCH FOR STUDENT TRAVEL NOTICE.

Payment or Reimbursement of Expenses

If the student organization member has received permission for specific travel expenses to be paid by the student organization FOAPAL, these expenses must be included on the Pre-Approval Report and below is a detailed explanation on payment or reimbursement. Only one Pre-Approval per person needs to be submitted and it needs to include all expected expenses approved for reimbursement.

Airfare Options:

1. Airfare Option #1 – the airline expense is to be paid from the organization FOAPAL and the student has already purchased their airline ticket. The following information will need to be emailed to Stacey Myers so that a Pre-Approval can be generated for the student prior to the trip date:
• Name, BSU ID#, and BSU email address of the student
• Name of the student organization
• Conference name, dates, location
• Amount of airline expense

For reimbursement – since an airline ticket is purchased in advance of the trip, a reimbursement will be processed prior to the trip and the airline receipt must be submitted so that an Expense Report can be generated within 60 days of the date on the receipt. Submit the following to Stacey Myers in order for an Expense Report to be generated and a reimbursement to be processed:

• Airline ticket receipt

2. Airfare Option #2 – the airline expense for several students is to be paid from the organization FOAPAL and the Ball State faculty advisor has purchased all of the student airline tickets. The following information will need to be emailed to Stacey Myers so that a Pre-Approval can be generated for the advisor prior to the trip date:

• Name and BSU email address of the faculty advisor
• Name of the student organization
• Conference name, dates, location
• Names, BSU ID#, and BSU email addresses of the students for which the airline tickets have been purchased
• Amount of airline expense

For reimbursement – since an airline ticket is purchased in advance of the trip, a reimbursement will be processed prior to the trip and the airline receipt must be submitted so that an Expense Report can be generated within 60 days of the date on the receipt. Submit the following to Stacey Myers in order for an Expense Report to be generated and a reimbursement to be processed to the advisor:

• Airline ticket receipts

Conference Registration Options:

1. Conference registration Option #1 – the conference registration fee is to be paid from the organization FOAPAL and the student has not yet submitted their registration. It is possible for the Travel Office to register the student for the conference using the BSU travel credit card (charged directly to organization FOAPAL). The following information will need to be emailed to Stacey Myers so that a Pre-Approval can be generated for the student prior to the trip date and the conference registration can be made by the Travel Office:

• Name, BSU ID#, and BSU email address of the student
• Name of the student organization
• Conference name, dates, location
• Amount of conference registration
• Link to conference registration website
• Any additional information that would need to be included in the registration, for example: if a conference attendee has the option to sign up for various conference sessions

2. **Conference registration Option #2** – the conference registration fee is to be paid from the organization FOAPAL and the student *has already* submitted the registration and paid the registration fee. The following information will need to be emailed to Stacey Myers so that a Pre-Approval can be generated for the student prior to the trip date:

   • Name, BSU ID#, and BSU email address of the student
   • Name of the student organization
   • Conference name, dates, location
   • Amount of conference registration
   • Link to conference website

   **For reimbursement** – since conference registration is typically paid in advance of the trip, a reimbursement will be processed prior to the trip and the conference receipt must be submitted so that *an Expense Report can be generated within 60 days of the date on the receipt*. Submit the following to Stacey Myers in order for an Expense Report to be generated and a reimbursement to be processed:

   • Receipt from the conference that confirms student is registered and indicates the amount paid and payment method
   NOTE: if the student is only being reimbursed for a portion of the conference registration payment (for example, receipt is for $100 but organization FOAPAL is only reimbursing the student $50), send an email to Stacey Myers indicating the amount of reimbursement that the student is to receive for the conference registration

3. **Conference registration Option #3** – the conference registration fee is to be paid from the organization FOAPAL and the student chooses to pay for the conference registration onsite at the conference. Follow Option #2 regarding what needs to be submitted for the Pre-Approval and for reimbursement.

**Meal Options:**

1. **Meals Option #1** – the meals are to be paid from the organization FOAPAL so the student pays for their meals and submits detailed receipts after the trip to be reimbursed. The following information will need to be emailed to Stacey Myers so that a Pre-Approval can be generated for the student prior to the trip date:
• Name, BSU ID#, and BSU email address of student
• Name of the student organization
• Conference name, dates, location
• Estimate for food expense
  NOTE: students aren’t usually funded per diem, however if this is the case, allow
  $8.00/breakfast, $8.00/lunch, $16.00/dinner

For reimbursement – once the trip has ended, the student has 60 days from the return date of
travel to be reimbursed. Submit the following to Stacey Myers in order for an Expense Report to
be generated and a reimbursement to be processed:
  • Itemized receipts from meals purchased
    NOTE: if per diem was approved, receipts are not necessary

2. Meals Option #2 – the meals are to be paid from the organization FOAPAL and the Ball State
faculty advisor is paying for students’ meals. The following information will need to be emailed
to Stacey Myers so that a Pre-Approval can be generated for the advisor prior to the trip date:
  • Name and BSU email address of the faculty advisor
  • Name of the student organization
  • Conference name, dates, location
  • Names, BSU ID#, and BSU email addresses of the students for whom meals are being
    purchased
  • Anticipated amount of total meal expense
    NOTE: if the advisor is receiving per diem for their own meals on the student
    organization FOAPAL, allow $8.00/breakfast, $8.00/lunch, $16.00/dinner

For reimbursement – once the trip has ended, the advisor has 60 days from the return date of
travel to be reimbursed. Submit the following to Stacey Myers in order for an Expense Report to
be generated and a reimbursement to be processed:
  • Itemized receipts from meals purchased
    NOTE: if per diem was approved for the advisor’s meals, then a receipt it not necessary

Lodging Options:

1. Conference hotel room price Option #1 – the hotel expense is to be paid from the organization
FOAPAL and one person has made reservations for the group with the reservation being held on
their personal credit card. It is possible for the Travel Office to contact the hotel to have the
reservation hold changed to the BSU travel credit card (i.e. charged to organization FOAPAL). A
Pre-Approval will need to be generated and the following information will need to be sent to
Stacey Myers:
  • Name, BSU ID#, BSU email address and phone # of person who made the reservation
  • Name of the student organization
• Confirmation # for the hotel rooms
• Actual reservation confirmation email from the hotel
• Hotel name, address, phone
• Conference name and location
• Check-in, check-out dates
• Room rates – price per room
• List of names and phone# of those occupying rooms – for example:
  o Room 1 – name/phone of person A, name/phone of person B, name/phone of person C, name/phone of person D
  o Room 2 – name/phone of person E, name/phone of person F, name/phone of person G, name/phone of person H

Since the hotel is being paid by the Travel credit card, there is no reimbursement process, however the student must submit a copy of the hotel folio upon return from the trip.

NOTE: Upon check-in, an individual may need to provide a credit card for incidentals, as the BSU travel credit card will only cover the room cost plus tax.

2. Conference hotel room price Option #2 – the hotel expense is to be paid from the organization FOAPAL and no one has made reservations for the group. It is possible for the Travel Office to contact the hotel to place a reservation on behalf of the organization by using the travel credit card (i.e. charged to organization FOAPAL). A Pre-Approval will need to be generated and the following information will need to be sent to Stacey Myers:

• Hotel name, address, phone
• Name of the student organization
• Conference name and location
• Conference website address
• Conference hotel reservation link
• Check-in, check-out dates
• Room rates – price per room
• List of names and phone# of those occupying rooms – for example:
  o Room 1 – name/phone of person A, name/phone of person B, name/phone of person C, name/phone of person D
  o Room 2 – name/phone of person E, name/phone of person F, name/phone of person G, name/phone of person H

Since the hotel is being paid by the Travel credit card, there is no reimbursement process, however the student must submit a copy of the hotel folio upon return from the trip.

NOTE: Upon check-in, an individual may need to provide a credit card for incidentals, as the BSU travel credit card will only cover the room cost plus tax.

3. Hotel Option #3 – the hotel expense is to be paid from the organization FOAPAL and the student chooses to pay for their own hotel expenses and submit a detailed receipt after the trip to be reimbursed. A Pre-Approval must be generated prior to the trip and the following information will need to be sent to Stacey Myers:
• Name, BSU ID#, and BSU email address of student
• Name of the student organization
• Hotel name, address, phone
• Conference name and location
• Check-in, check-out dates
• Room rates – price per room

For reimbursement – once the trip has ended, the student has *60 days from the return date of travel* to be reimbursed. Submit the following to Stacey Myers in order for an Expense Report to be generated and a reimbursement to be processed:

• Detailed hotel receipt which indicates the amount paid and payment method

4. **Hotel Option #4** – if there is not a conference hotel price or link to the conference hotel, Ball State uses the booking tool Egencia and an Accounts Payable staff member will make the reservation for the organization at an inexpensive hotel. Information for the Pre-Approval and for an Egencia hotel reservation needs to be sent to Stacey Myers:

• Name, BSU ID#, and BSU email address of student(s)
• Name of the student organization
• Conference name and location
• Check-in, check-out dates
• Provide hotel options close to the conference site or if not aware of hotel options, provide the location of the conference so that a search can be done for nearby hotels
• Number of rooms needed
• Amount per room per night budgeted
• List of names and phone numbers of those occupying rooms – for example:
  - Room 1 – name/phone of person A, name/phone of person B, name/phone of person C, name/phone of person D
  - Room 2 – name/phone of person E, name/phone of person F, name/phone of person G, name/phone of person H

***Please be aware that the Egencia hotel is not actually booked until the Pre-Approvals are completed and fully approved. Occasionally the original price of the hotel may increase from the time the Pre-Approval is entered into the Travel system to the time the Pre-Approval is approved by the both the student and administration.***

**Additional Forms to Complete**

1. **Student Travel Notice** – as mentioned earlier in this document, complete one Student Travel Notice form that includes a list of students and emergency contact information. This is an electronic form which can be found at [SERVICE NOW](http://servicenow.com), then search for ‘Student Travel Notice’. Once you complete and submit the Student Travel Notice, it will go to the appropriate university administration for approval. If the Service Now link in this paragraph is not working, go to
**www.bsu.edu/studentorganizations**, click TRAVEL FORMS, click LOG ONTO SERVICE NOW TO SEARCH FOR STUDENT TRAVEL NOTICE.

**Items to Note**

1. If the student requests the Pre-Approval Report, before it will be generated, Stacey Myers will reach out to the Ball State faculty advisor for approval to use the organization FOAPAL.
2. Student organizations cannot reserve Ball State vehicles and charge them to the organization FOAPAL.
3. If the trip is department-related but the expense of a Ball State vehicle is to be paid from an organization FOAPAL, and the organization’s Ball State faculty advisor plans to drive the Ball State vehicle with organization members as passengers, the following needs to happen:
   - The academic department will need to submit a Pre-Approval for the faculty advisor using the department FOAPAL.
   - The academic department will need to request a vehicle for the faculty advisor through Fleet Commander using the department FOAPAL.
   - After the trip, once the vehicle expense has cleared the department account, the Administrative Coordinator can generate a journal voucher to transfer the amount (as indicated in Banner FRGITRND of which a screenshot will need to be attached to the journal voucher) by debiting the organization FOAPAL and crediting the department FOAPAL.
4. When the hotel is reserved using the BSU travel credit card or through Egencia, a third party authorization is sent to the hotel. On rare occasions, if the authorization has not been received by the correct hotel person, as a Ball State student checks in they may be asked to provide their own credit card to pay for the hotel. Unfortunately, when this happens it is beyond the university’s control. If this does happen, please follow the guidelines for Hotel Option #3 so that a reimbursement can be processed after the trip.
5. If the Advisor is paying for airline, registration fees, meals or lodging and is to be reimbursed by the student organization FOAPAL, the rules above apply except that a Pre-Approval Report will need to be generated for the Advisor. The department Administrative Coordinator has the ability to generate the Pre-Approval and the Expense Report using the organization FOAPAL or Stacey Myers can generate the Pre-Approval and the Expense Report using the organization FOAPAL.

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