

**MEMORANDUM**

**DATE:** September, 2008

**TO:** Department Chairs, R&E Directors, District Directors, Travel Personnel,  
and Research/Extension Participants in Multistate Travel

**FROM:** Ralph Cavalieri, *Ralph P. Cavalieri*  
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**SUBJECT:** ARC Policy for Multistate Travel Funds and Associated Flowchart

ARC and Extension faculty participation in Multi-State research projects and Extension Research (ERA) Committees is one of the ways we fulfill our mission by collaborating with scientists throughout the nation. A portion of the Hatch funds (ARC) and Smith-Lever funds (Extension) received from USDA Cooperative States Research, Education and Extension Services (CAREES) must be used to support approved Multi-State research and ERA activities and associated travel.

ARC and Extension cover the travel expenses proportional to the FTE percentage of the appointment of the traveler. Both Hatch and Extension travel funds are finite. Keeping track of reimbursements to research and/or extension accounts has become more cumbersome because of accountability procedures.

ARC and WSU Extension approval for Multi-State travel will be based on the following considerations:

1. Maintaining a current ARC project: To receive any funding from the ARC, all CRIS forms for new ARC proposals or progress reports for current ARC projects

must be completed at the time of application for Multi-State travel funding.

2. The Agricultural Research Center (ARC) and WSU Extension will fund one faculty member per approved Hatch Multi-State project, National Research Support Project (NRSP), Coordinating Committee (CC), Development Committee (DC), or Education/Extension and Research Activity Committee (ERA) for travel to an authorized annual meeting per year.

Consequently, travelers, department chairs, and station directors should use these guidelines.

1. The meeting must be authorized by the administrative advisor of the project or committee on the web-based National Information Management Support System (NIMSS) before travel requests will be considered. A simple email announcement of the meeting will not suffice as the authorization.
2. The department will prepare the paper TA signed first by the Department Chair or Director and sent to the ARC. The ARC Director and/or the Extension Dean will then review the TA for approval. ARC will then fax back a signed copy of the TA to the department. The department will enter it into the Position and Travel Request System (PTRS). Make sure in the comments that you specifically state two items: 1) that the trip is for "Multi-State" travel and list the group (such as W-1009), and 2) that authorization has been given from the ARC and/or Extension. Check back often to see when the VP/Chancellor approves. You may wish to make a note of the unique number from the PTRS system when it is approved on the TA or staple a screen print of the approval to the TA. **Attached at the end of this document is a "Flowchart for Processing Travel Authorities (TA's) for Multi-State trips" for greater detail.**
3. Travel funds provided by the ARC or WSU Extension under this program are limited to \$1200 per trip authorized both by ARC and/or Extension. If the traveler holds appointments in both the ARC and Extension, funding will be split according to the traveler's appointment percentages. If the traveler holds appointments between ARC and Academic Programs in CAHNRS, the ARC will pay for the travel. In all cases, the total travel funding for airfare, food, lodging, and incidentals as allowed by WSU travel guidelines will be limited to \$1200. Funding for authorized travel under this program that exceeds the \$1200 provided by ARC and/or Extension must come from other appropriate sources such as authorized travel funds already written into grants or other departmental funds.

4. Travel to and from the annual meeting must be by the least expensive mode of travel unless prior approval has been received. For example, if airfare to a meeting is \$300 and a rental car charge would be \$500, we would pay for the airfare or reimburse \$300 of the rental car charge. We expect reservations to be economical.

Please note that when traveling outside the country or domestically, U.S. carriers must be used per USDA requirements.

5. **In order to have airfare reimbursed it must be charged to an approved ARC Multi-State project and/or the Multi-State Extension budget (new this year).** One way to ensure this is to have the travel agent call Ellen Yeates at ARC and she will first check to see that all approvals are in place from the ARC/Extension areas as well as the VP/Chancellor in PTRS. The airfare can then be put on the Multi-State CTA. The other way is to use your WSU corporate card and have the airfare included on your TEV. Before ARC can authorize our account for your airfare, we must have (a) **The authorization memo from the Multi-State Administrative Advisor recognized on the web-based NIMSS system,** (b) **A copy of your TA signed by the department chair** in our office (a faxed copy is sufficient), and (c) an approved TA in PTRS.
6. Approval is generally given to stay in the lodging facility where the meeting is being held to achieve maximum benefit of having a business interaction with the other travelers on the project or committee.
7. Quite often Multi-State meetings are in conjunction with other professional meetings. This is one of the benefits of participating on a Multi-State project or ERA committee because we can reimburse travel to and from the authorized meeting and its associated expenses. The traveler, therefore only incurs the per diem and registration expenses of the professional meeting. Please be sure to specify in the PTRS system which dates are for Multi-State travel and list the Multi-State project number.
8. All budget and expense paperwork must be processed through ARC administration. **Reimbursement of expenses may be delayed, partially reimbursed, or denied** if your TA is not submitted for approval to the ARC or in PTRS before the trip and/or your TEV paperwork is not submitted through the ARC office for payment. Ellen Yeates is the designated contact for Multi-State Travel and also has access to Informed Filer, for those of you with electronic submission of Travel Expenditure Vouchers (TEV). The TEV must be processed through ARC, not the Business and Finance Office (BFO).

Exceptions to this policy must be reviewed and approved in writing preferably by email by the Director of the ARC; and if an Extension appointment is involved, by the Dean or Associate Dean of WSU Extension.

In addition to the above requirements, when an exception is requested, the following will also be considered:

Productivity associated with the Multi-State Project or Committee: Please list any publications the traveler has authored within the past three years or grants the traveler has received within the past three years as a result of the affiliation with the Multi-State research project, coordinating committee, or ERA committee to which the travel funding is requested. Attach this information to your Travel Authority (TA).

Although not all of the above procedures are new, this memo has been sent out to clarify the new procedures involving the PTRS system. If you have any questions please do not hesitate to call Ellen Yeates at: 509-335-4563.

**NOTE TO ARC/RESEARCH/EXTENSION TRAVELERS:** Please remember to tell the person doing your travel paperwork that your trip is Multi-State travel and to please send this paperwork to Ellen Yeates in the College of Agricultural, Human, and Natural Resource Sciences (CAHNRS) ARC mail stop 6240, not Business and Finance (BFO).

Flowchart for Processing Travel Authorities (TA's) for **Multi-State** Trips  
Using the Position and Travel Request System (PTRS)

