

Lehman College  
of The City University of New York

# GUIDELINES FOR CANDIDATE TRAVEL



[www.lehman.cuny.edu](http://www.lehman.cuny.edu)



LEHMAN  
COLLEGE



Herbert H. Lehman College, The City University of New York

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## Introduction

Lehman College will pay reasonable expenses for faculty and ECP candidates to visit the College to meet with the search committee and other individuals. These guidelines have been developed to ensure that search committees, administrative staff persons to the search committees, and all other personnel responsible for requesting, processing and approving travel requests understand the steps to request approval for travel, understand New York State procurement rules relative to reimbursable and non-reimbursable expenses, and can provide complete and accurate information to candidates who are not employed by CUNY at the time of the interview as well as those candidates who are employed by CUNY at the time of the interview.

## Section 1. Approval of Travel

Hiring departments may discuss travel dates and plans with out-of-town candidate(s) but the approval of the dean or administrator of the school or division with whom the candidate is interviewing is required before any travel that involves the purchase of airline, bus or rail tickets and/or hotel accommodations will be arranged. Travel dates and advance purchasing make a significant difference in the cost of the airline tickets therefore, the search committee should develop and adhere to a search timeline that has sufficient lead time to arrange travel that is economical.

### **Academic Affairs**

A *Travel Request Form* (see Appendix 1 for *Travel Request Form*) must be completed for each candidate and submitted to the division head. The *Travel Request Form* can be downloaded from the websites of the Office of the Provost, <http://www.lehman.edu/provost/>, the websites for each academic school, Human Resources, <http://www.lehman.edu/human-resources/forms.php>, and Accounts Payable, [www.lehman.edu/administration/business-office/accounts-payable.php](http://www.lehman.edu/administration/business-office/accounts-payable.php).

After the *Travel Request Form* is approved by the division head it is to be sent to the Office of the Provost. The Office of the Provost will send an email alerting the travel agency that the candidate will be contacting them. This notification will include the name of the candidate, the date and time of the campus interview, the time the candidate must arrive on campus, the earliest time the candidate should depart the campus and any special considerations as approved by the division head. It will also include the name and contact information (email address, telephone number) for the College representative responsible for reviewing the itinerary. The email message will be copied to the originator of the travel request.

After the hiring department receives a copy of the email message from the Office of the Provost, the details of the campus visit should be finalized with the candidate. The hiring department will give the candidate the contact information for the travel agent and advise the candidate to call or write the travel agent without delay. The details of the travel are to be confirmed in writing. It is the hiring department's responsibility to review and confirm the itinerary before it is sent to the Office of the Provost for final approval (see Appendix 2a, 2b and 2c for sample letters and travel form to send to the candidate).

The Office of the Provost will approve the travel arrangements and provide payment to the travel agency. Airline tickets must be purchased within 24 hours of the reservation otherwise the seat is released and/or the price could change, therefore, it is incumbent for all reviews and approvals to be processed immediately.

### ***Executive Compensation Plan (ECP) Searches***

The chair of the search committee will send the *Travel Request Form* to the Office of the President. After the form is approved, the administrative staff person to the search committee (hereafter staff person) will send an email alerting the travel agency that the candidate will be contacting them. The email message will be copied to the chair of the search committee. This notification will include the name of the candidate, the date and time of the campus interview, the time the candidate must arrive on campus, the earliest time the candidate should depart the campus and any special considerations as approved. It will also include the name and contact information (email address, telephone number) for the College representative responsible for reviewing the itinerary.

The staff person will provide the candidate with the contact information for the travel agent and advise the candidate to call or write the travel agent without delay. The details of the travel are to be confirmed with the candidate in writing (see Appendix 2a, 2b and 2c for sample letters and travel form to send to the candidate).

### ***Candidate Arranges Own Travel***

If the candidate prefers to arrange their own travel, a *Travel Request Form* still must be completed and all appropriate approvals secured. The hiring department must also provide appropriate guidance to the candidate to ensure NYS guidelines are followed. The guidelines are explained in the following sections of the guidelines: *Section 3: Travel Reimbursement*, *Section 4: Reimbursable Interview Expenses* and *Section 5: Non-Reimbursable Expenses*.

### ***Candidate is a Current CUNY Employee***

The College cannot use the Net Card to pay for any travel expenses for a CUNY employee, this includes candidates employed by Lehman or another CUNY institution.<sup>1</sup> In this instance the candidate has two options. The first option is for the candidate to use their CUNY issued travel card to pay for all travel related expenses and submit an expense report through the CUNYfirst Travel and Expense module. The candidate would also need to request a preauthorization through this module before the trip commences. Since the chart field codes will be that of Lehman College, the candidate's home college will be aware of this trip<sup>2</sup>. The second option is for the candidate to pay for all travel related expenses using their own personal credit card and seek reimbursement from Lehman College. If the total reimbursement is less than \$250, the College can use the Imprest Fund to pay this reimbursement. Expense reimbursements of \$250 or greater will be a direct deposit to the candidate's bank account or a state issued check that is mailed to the candidate.

### **Section 2. Car Service**

The request for car service should be made at the same time as all other travel using the *Travel Request Form*. If car service *is not* requested at the same time, the department has to submit a requisition in CUNYfirst and work with Lehman's Purchasing department to schedule car service (see Appendix 3 for how to submit a requisition for car service in CUNYfirst). Candidates must be at the hotel pickup location at the designated time in the morning and at the campus pickup location at the scheduled departure time otherwise, the College will incur additional unnecessary expenses. Also, if the candidate does not depart campus at the scheduled time, they may not arrive to the airport or other departure point with sufficient time to check in.

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<sup>1</sup> The Net card is the credit card for non-employee travel.

<sup>2</sup>The travel card defaults to the home college chart fields therefore, the user will have to change the chart field from their home college to Lehman's chart field for the expense report to be reimbursed. The candidate can obtain the chart field information from the department representative they are communicating with. If the candidate does not have a travel card they need to enter the travel reimbursement through CUNYfirst to seek reimbursement from Lehman College.

## **Section 3. Travel Reimbursement**

### ***Travel Reimbursement Forms***

The hiring department or staff person, in the case of an ECP search, should send the candidate the link to the *State of New York Standard Voucher AC92* form (travel reimbursement form) prior to the interview otherwise the form should be downloaded and given to the candidate while he/she is on campus. The link to the State of New York Standard Voucher AC 92 is [http://www.lehman.edu/administration/business-office/documents/StandardVoucher\\_000.pdf](http://www.lehman.edu/administration/business-office/documents/StandardVoucher_000.pdf).

Candidates should be advised to retain and submit original receipts for reimbursement. The receipts must show the amounts for the individual items purchased, the total amount charged on a credit card slip is not sufficient. Candidates should also be advised to submit the *State of NY Standard Voucher AC 92* form and original supporting receipts and documents within ten (10) days after the completion of travel.

If claiming reimbursement for automobile expenses, the candidate must complete the *State of NY Statement of Automobile Travel*. The following is the link to the NY Statement of Automobile Travel: <http://www.osc.state.ny.us/agencies/ac160statmntoftravel.pdf>.

### ***Processing Travel Reimbursement Forms***

The hiring department or staff person should complete the review of the *State of New York Standard Voucher AC 92* and/or the *State of NY Statement of Automobile Travel* form within seven (7) days after receiving the form(s) from the candidate. Payment will be made directly to the candidate. (See Section 4 of these guidelines for additional guidance about reimbursable and non-reimbursable interview expenses.<sup>3</sup>)

### ***Academic Affairs***

Once the hiring department ensures that receipts and documentation are complete and eligible for reimbursement, the form(s) should be signed and forwarded to the Office of the Provost who, after review and approval, will send the document packet to Accounts Payable.

### ***Executive Compensation Plan (ECP) Searches***

Once the search committee chairs ensures that receipts and documentation are complete and eligible for reimbursement, the form(s) should be sent to the Office of the President, who, after review and approval, will send the document packet to Accounts Payable.

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<sup>3</sup> Questions about New York State reimbursement policies and procedures and the forms should be directed to Sonia Rodriguez, Accounts Payable, at [sonia.rodriguez@lehman.cuny.edu](mailto:sonia.rodriguez@lehman.cuny.edu) or by calling Ext. 8318.

## Section 4. Reimbursable Interview Expenses

### ***Airline/Train/Bus Travel***

New York State regulations permit the purchase of coach seating airline tickets. Upgrades are at the candidate's personal expense and are not reimbursable.

### ***Mileage***

Candidates travelling by automobile will be reimbursed for tolls and mileage at the State of New York mileage rate in effect at the time of their travel. The standard mileage allowance is established by the Internal Revenue Service (IRS). As of September 2014, the mileage rate is 56 cents per mile. The mileage rate can be found on the College's website at <http://www.lehman.edu/administration/business-office/accounts-payable.php>.

Mileage reimbursement should never exceed the cost of available alternate transportation, that is, the reimbursement for mileage cannot exceed the lowest airfare or train rate available. The candidate must submit original receipts for tolls and indicate miles traveled on the *NY Statement of Automobile Travel* form. Reimbursement is limited to mileage associated with travel to and from the interview only.

### ***Hotel Expenses***

Hotel reservations for the approved duration of the interview will be made for the candidate. All extended stays beyond the interview schedule must appear in the *Request to Travel* form and be pre-approved by the division head. Any extended stay not pre-approved by the division head, shall be at the candidate's expense. Typically, reservations will be made for the candidate to check-in to the hotel the night before the interview and check-out will be the same day as the last interview unless airline or other travel cannot be arranged or an extended stay is pre-approved by the division head.

If a candidate requests a Manhattan hotel, the College will pay an amount equivalent to the government rate for a local hotel (currently \$139/night). The candidate will have to pay the difference unless special permission has been granted by the division head for the candidate to be booked in a Manhattan hotel. The explanation for booking the candidate in a Manhattan hotel must appear in the *Request to Travel* form and the approval of the division head is required.

All lodging incurred during extended stays not pre-approved by the division head shall be at the candidate's personal expense.

## **Meals**

Candidates are eligible to be reimbursed for their breakfast and dinner at rates that are determined by NYS guidelines. Lunch and alcoholic beverages are not reimbursable. The candidate should provide original, itemized receipts along with the *State of New York Standard Voucher AC 92* travel reimbursement form.

All meals incurred during an extended stay that are not pre-approved by the division head shall be at the candidate's personal expense.

## **Ground Transportation**

Parking fees at airport facilities, taxi fares from home to and from the airport, to and from the airport to the hotel, and to and from the campus are reimbursable unless prepaid for by the College. The candidate must submit original receipts for these incidental expenses along with the *Standard Voucher AC92 form*.

## **Section 5. Non-Reimbursable Expenses**

Non-reimbursable expenses include, but are not limited to, airline insurance, seat upgrades, alcohol or mini-bar charges, travel expenses for other individuals accompanying the traveler, hotel upgrades, lost or excess baggage, personal items lost while traveling to and from the College, and personal entertainment including earphones in flight, movie, videos or DVD rentals in hotel room.

## **Section 6. Guidelines and Forms**

The following guidelines and forms can be downloaded from the Accounts Payable website:  
[www.lehman.edu/administration/business-office/accounts-payable.php](http://www.lehman.edu/administration/business-office/accounts-payable.php).

- Mileage Rates
- Office of the State Comptroller Travel Manual:
- State of NY Standard Voucher
- State of NY Statement of Automobile form
- Travel Request Form

The *Travel Request* form can be downloaded from the websites for the Office of the Provost, the home page for the academic schools and Human Resources.



## Appendix 1: Travel Request Form Faculty and ECP Searches

Instructions: Lehman College will pay reasonable expenses for faculty and ECP candidates to visit the College to meet with the search committee and other individuals. This travel may include one night's lodging at the College's preferred hotel and car services as appropriate. All travel requests must be pre-approved by the dean/division head. The candidates' CV/resume and the interview schedule must accompany the *Travel Request Form*. See *Guidelines for Candidate Travel* for additional guidance.

### Travel Request

- 1) This is a request for:  airline travel  railroad travel  hotel accommodations  car service
- 2) Will travel agency be used?  Yes  No
- 3) Will candidate arrange own travel?  Yes  No
- 4) Request for an exception to the travel guidelines:  Extended stay before or after interview:  
# of additional days requested \_\_\_\_\_  
Arrival date \_\_\_\_\_  
Departure date \_\_\_\_\_  
 Manhattan hotel  
 Reasonable accommodation (religion or disability)

An explanation is required for an extended hotel stay (typically longer than one (1) night), accommodations in a Manhattan hotel, or any other exceptions to the travel guidelines.

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Candidate Information (Attach Candidate's CV/resume)

First Name \_\_\_\_\_ Last Name: \_\_\_\_\_

Email: \_\_\_\_\_ Cell Number: \_\_\_\_\_

Candidate's departure city: \_\_\_\_\_

City candidate will return to after interview: \_\_\_\_\_

**Search Information**

FT Position Request Form (PRF)# \_\_\_\_\_ Job ID # \_\_\_\_\_

Position Title: \_\_\_\_\_

Number of out-of-town candidates from this search that will be invited to campus: \_\_\_\_\_

Number of local candidates from this search that will be invited to campus: \_\_\_\_\_

**Interview Status and Schedule – (Attach interview schedule)**

- Interview Status:
- Initial Interview
  - Campus interview following telephone or video screening interview
  - Finalist interview
  - Visit following offer of appointment

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Department Information**

Travel Request prepared by: \_\_\_\_\_ Ext. \_\_\_\_\_  
Name and Title

Contact Person for Travel Agency: \_\_\_\_\_ Email: \_\_\_\_\_  
Name and Title

Approvals: Academic Affairs

- Department Chair/Director \_\_\_\_\_
- Dean \_\_\_\_\_
- Office of the Provost \_\_\_\_\_

Administrative Divisions

- Director/Department Head \_\_\_\_\_
- Vice President \_\_\_\_\_

Send copy of approved form to: Hiring Department/Originator of Request

## Appendix 2a: Sample Letter to Out of Town Candidates Traveling by Airline

Date

Inside Heading

Dear:

We are pleased to invite you to interview for the position of \_\_\_\_\_ (insert title) with the Department of \_\_\_\_\_ at Lehman College of The City University of New York.

(insert department name). Your interview is scheduled for \_\_\_\_\_ at \_\_\_\_\_.

Insert day/date insert time

When you arrive on campus, please come to \_\_\_\_\_, room \_\_\_\_\_ where you will

Building name

be met by \_\_\_\_\_. This link will direct you to the campus map on the Lehman College website.

Name/Title

<http://www.lehman.edu/about/maps-and-directions.php/>.

You will meet with (list names and titles):

**Additional information to include in the letter for out of town candidates as appropriate to the travel circumstances:**

The following information will help you to plan your visit to Lehman College.

The college will cover the cost of one round trip coach airline ticket and one overnight stay at a nearby hotel. Please contact Frank Acutrone and Michael McCabe of Advantage Travel, Inc. for assistance with airline, ground transportation in NYC and hotel arrangements. You can reach them at (518) 426-0052 or by writing to Mr. Acutrone at [acutrone@advantagetravelinc.com](mailto:acutrone@advantagetravelinc.com) or Mr. McCabe at [mmccabe@advantagetravelinc.com](mailto:mmccabe@advantagetravelinc.com).

We will also reimburse you for reasonable expenses associated with your visit to the campus including breakfast and dinner, parking fees at airport facilities and any incidental expenses. Taxi fares to and from the airport to the hotel, and to and from the campus are reimbursable if the College does not arrange for transportation. Please retain the original receipts and submit them with the *State of New York Standard Voucher AC 92* (travel reimbursement form) within ten (10) days following your interview. The receipts must show the individual items purchased; the total amount charged on a credit card slip is not sufficient. As an additional note, please include a copy of the hotel check-out receipt with the documents that you send to the College. You can download the *State of New York Standard Voucher* from this link [http://www.lehman.edu/administration/business-office/documents/StandardVoucher\\_000.pdf](http://www.lehman.edu/administration/business-office/documents/StandardVoucher_000.pdf).

Travel expenses that are not reimbursable include, but not limited to, airline insurance, seat upgrades, alcohol or mini-bar charges, travel expenses for other individuals accompanying the traveler, hotel upgrades, lost or excess baggage, personal items lost while traveling to and from the College for the interview, personal entertainment including earphones in flight, movie, videos or DVD rentals in hotel room.

If you are unable to keep this appointment, please contact \_\_\_\_\_ by writing to  
insert name

at \_\_\_\_\_

email address

We look forward to greeting you on \_\_\_\_\_.

Interview day/date

Sincerely,

Name

Title

## Appendix 2b: Letter to Out-of-Town Candidates Traveling by Personal Vehicle

Date

Inside Heading

Dear:

We are pleased to invite you to interview for the position of \_\_\_\_\_ (insert title) with the Department of \_\_\_\_\_ at Lehman College of The City University of New York.  
(insert department name). Your interview is scheduled for \_\_\_\_\_ at \_\_\_\_\_.  
Insert day/date insert time

Please park in the \_\_\_\_\_ parking lot then come to \_\_\_\_\_, room \_\_\_\_\_  
Building name  
where you will be met by \_\_\_\_\_. This link will direct you to the Maps and Directions page of the  
Name/Title

Lehman College website.

You will meet with : (list names and titles)

**Additional information to include in the letter for out of town candidates who are driving to campus and no overnight:**

This information will help you to plan your visit to Lehman College.

You will be reimbursed for tolls and mileage at the State of New York mileage rate of \_\_\_\_\_cents/mile. To request reimbursement, please download and complete the *State of NY Statement of Automobile Travel form*. The form can be downloaded from this link [http://www.lehman.edu/administration/business-office/documents/StandardVoucher\\_000.pdf](http://www.lehman.edu/administration/business-office/documents/StandardVoucher_000.pdf). Please send the completed form with receipts for tolls within ten (10) days following the interview.

If you are unable to keep this appointment, please contact \_\_\_\_\_ by writing to  
insert name  
at \_\_\_\_\_  
email address

We look forward to greeting you on \_\_\_\_\_.  
Interview day/date

Sincerely,

Name  
Title

## Appendix 2c: Travel Information Form To Send to Candidate with Confirmation Letter

### Section 1: Completed by hiring department

Your interview for the position of \_\_\_\_\_ is scheduled for \_\_\_\_\_  
\_\_\_\_\_. Please contact Advantage Travel to arrange the following travel and/or hotel accommodations. You should speak to Frank Acutrone at [acutrone@advantagettravelinc.com](mailto:acutrone@advantagettravelinc.com) or Michael MCCabe at [mmccabe@advantagettravelinc.com](mailto:mmccabe@advantagettravelinc.com). The telephone number (518)426-0052

Flight       Railroad       Hotel # of nights \_\_\_\_\_       Car Service

#### **Car Service:**

Pickup Date/Time: \_\_\_\_\_ From: \_\_\_\_\_ To: Lehman College Gate # \_\_\_\_\_

Pickup Date/Time: \_\_\_\_\_ From: Lehman College, Gate \_\_\_\_ To: departure point

Pickup Date/Time: \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

### Section 2. Completed by Candidate

Please complete the section (as appropriate). This information will help the agent to arrange your travel and/or accommodations.

Name: \_\_\_\_\_

Cell Phone# \_\_\_\_\_ Alternate# \_\_\_\_\_

Email Address: \_\_\_\_\_

Emergency Contact (Optional) Name: \_\_\_\_\_ # \_\_\_\_\_

#### **Air Travel Information**

Date of Birth: \_\_\_\_\_ Sex (M/F): \_\_\_\_\_

Travel Date: \_\_\_\_\_ Time: \_\_\_\_\_

From State/Airport Code: \_\_\_\_\_ To State/Airport Code: \_\_\_\_\_

Return Date/Time: \_\_\_\_\_

From State/Airport Code: \_\_\_\_\_ To State/Airport Code: \_\_\_\_\_

Passport other than USA: \_\_\_\_\_

#### **Amtrak (to be completed by candidate only if traveling by rail to campus):**

Date: \_\_\_\_\_ From Station/Time: \_\_\_\_\_ To Station/Time: \_\_\_\_\_

Return Date: \_\_\_\_\_ From Station/Time: \_\_\_\_\_ To Station/Time: \_\_\_\_\_

### Appendix 3: Instructions to Submit a Requisition for Car Service in CUNYfirst

If the request for car is not included in the *Request to Travel Form* the hiring department should follow these instructions to submit a requisition in CUNYFirst for car services.

Enter the following information:

Vendor: **Dummy P-Card Vendor** or Vendor ID: **7777777777**

Description: **Car service for (name of candidate), date, time, location: pick-up/drop-off**

Example of description:

**Car services for Jane Doe, candidate for position of (insert position title)**

- 1. Pickup date (insert date) at (insert pickup time from hotel) am at Hampton Inn @160 Corporate Blvd, Yonkers to Lehman College, dropoff location (for example gate number and street name)**

Price: approximately \$66.00

Category: **8888001100** or **Travel Card Ground transportation non-PSC**

Chartfield information:

Line	Pct	Req Qty	Amount	GL Unit	Location	Account	Oper Unit	Fund	Dept
1	100	1	\$66	LEH01	SH-381	52254	9999	10	10387
Program	MP	Sp Init	Fnd Src						
99999	100	9999	999999						