

Travel and Expense Entry in SFS



Introductions



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Guiding Principals

Guiding Principles – Where to Start

- **Travelers and their supervisors should work with their agency's finance office or travel unit when they have questions**
- **The following resources offer guidance and policy related to State employee travel:**
 - OSC Travel Manual
 - OSC Guide to Financial Operations, Section XIII
 - OSC Travel Regulations (2 NYCRR Part 8)
 - Agency-specific policies
- **Agency finance office or travel unit personnel may also contact the BSE at stexpend@osc.ny.gov for assistance when other resources are exhausted**



Guiding Principles for Travel: B.R.A.I.N.

- **When in doubt, travelers, supervisor and agency approvers should consider if a travel scenario and expenses are:**
 - in the Best Interest of the State
 - Reasonable
 - Actual Expenses
 - Supported by Itemized Receipts
 - For Necessary Travel



Travel Status

Determining Travel Status

- Employees are in travel status when they must travel 35 miles or more from **BOTH** their home **AND** their official station
- Employees are traveling in proximity (not in travel status) when they travel fewer than 35 miles from **EITHER** their official station **OR** their home



Travel Status vs. Proximity

Travel: What's the Difference?

- **Employees are eligible for reimbursement of expenses for lodging, transportation, meals & incidentals, etc. when they are in travel status**
- **Employees are typically only reimbursed for personal vehicle mileage when traveling in proximity**
 - Any other travel expenses incurred while traveling in proximity are allowable only when necessary and in the best interest of the State
 - Such expenses should be pre-approved and include a documented justification



Personal Vehicle Mileage

Personal Vehicle Mileage Guidelines

- **Travel between an employee's home and official station is considered commuting and is not reimbursable**
- **Personal vehicle mileage is reimbursable for trips between:**
 - Home and an alternate work location
 - Official station and an alternate work location
 - Alternate work locations
- Please see the OSC Travel Manual and the [2025 Fall Conference Travel Refresher and FAQ](#) for more information on personal vehicle mileage



Lodging and Per Diem

Lodging and Per Diem Reimbursement

- **The following is based on a receipted reimbursement (method II), which is the most common**
 - See the OSC Travel Manual for additional information on unreceipted reimbursements (method I)
- **Employees in travel status are eligible for reimbursement of meals and incidental expenses (M&IE/per diem) and lodging for overnight trips**



Lodging and Per Diem Continued

- **The per diem amount covers expenses for dinner, breakfast the following day as well as incidental expenses**
- **Travelers may also be entitled to extra meals on the first and last day of travel if they meet the following conditions:**
 - An additional per diem for breakfast on the first day if the traveler departs at least one hour before their normal work start time
 - An additional per diem for dinner if they return at least two hours later than their normal work end time on the last day of travel



Determining Lodging and Per Diem Amounts

- **Rates for lodging and per diems are established and published by the United States General Services Agency (GSA) and are based on location**
 - Lodging and M&IE Rates can be found at <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- **When meals and/or lodging are provided as a part of a conference or event, additional reimbursement is not permitted**



Common Carriers

Air Travel, Rail Travel, and Vehicle Rentals

Travel via Common Carrier

- **Travel via Common Carrier is often the most efficient and cost-effective method of transportation, especially when traveling between Albany and New York City**
- **The Office of General Services has a contract with Stovroff and Taylor for state travel management, as well as negotiated rates for Air Travel, Amtrak, and Vehicle Rentals**



Common Carrier – Air Travel

- **Air Travel: Must be booked through the authorized state travel agency using the OGS contract with Southwest or American Airlines**
 - Employees may only use non-contract fares when (i) the fare saves \$200 or more per round-trip, (ii) the use of a contract fare would incur unnecessary overnight lodging, or (iii) in case of an emergency



Common Carrier – Amtrak

- **Amtrak: NYS has a negotiated maximum rate of \$68 for a one-way fare between Albany-Rensselaer or Hudson and New York-Penn Station**
 - Can be booked through the state travel agency (with a processing fee) or in person with a NYS employee ID



Common Carrier – Vehicle Rental

- **Vehicle Rental: OGS offers negotiated rates with Enterprise/National and Hertz that include necessary insurance and liability coverage**
 - Travelers should select the most cost-effective vehicle available. If there is a business need for a larger vehicle, the traveler must obtain approval from the Agency's Finance Office



Additional Resources

Resources

- **Always remember to consider B.R.A.I.N. when booking travel and submitting expense reports**
- **For additional information about the topics discussed in this refresher presentation, please take advantage of the following resources:**
 - [OSC Travel Manual](#)
 - [OSC Guide to Financial Operations, Section XIII](#)
 - [OSC Travel Regulations \(2 NYCRR Part 8\)](#)
 - [Office of General Services Travel Contracts](#)
 - [2025 Fall Conference Presentation](#)
 - Agency-specific travel policies



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