
POLICY: I: 03—Training and Travel Request

Policy Review: Annually

APPROVED: Executive Director of Facilities and Construction:

DATED: June 2008

UPDATED: March 2021

[Signature] 3/16/2021

I. PURPOSE

To provide a uniform process for Facilities Management (FM) employees to request training, certification/license requirements/renewals, professional memberships, as well as provide information pertaining to travel and per diem.

II. DEFINITIONS

A. Per Diem – Daily allowance for food, lodging, and miscellaneous travel expenses.

III. RESPONSIBILITIES

- A. Executive Director of Facilities and Construction – Responsible for the overall implementation of the procedure.
- B. Directors, Managers and Supervisors – Responsible for ensuring staff members are familiar with the provisions of procedure.
- C. Budget Manager – Responsible for ensuring training requests, travel vouchers, and payment requests for certification/license/membership are properly authorized and payments issued.

IV. PROCEDURE

- A. [A FM request form for training, certification/license, and memberships](#), must be completed and forwarded to the FM Payroll Services assistant prior to attending training, seminars, conferences, new/renewal of memberships, certifications, and new/renewal of licenses. Verification of cost such as, course content, fees, dues, lodging costs, dates, location, and duration of the course should be attached to the request.
- B. The requestor may download the request form from the [FM website](#).
- C. Electronic approvals are obtained by the Payroll Services assistant and registrations and/or reservations made.
- D. The employee will be responsible for additional costs if the allowable per diem for meals is exceeded. Receipts are not required for meals.

E. Transportation:

1. Employees should use a state vehicle when available. Requests may be placed through FM Payroll Services assistant.
2. An employee who chooses to use their personal vehicle as a matter of convenience will be reimbursed for mileage at .246 cents per mile for trips exceeding an average of 280 miles per day. To receive the higher mileage reimbursement rate for personal vehicle mileage exceeding an average of 280 miles per day per trip, the employee must request the Transportation Manager to certify one of the following apply:
 - A state-owned vehicle rental is not available or accessible.
 - It is in the interest of the University to use a personal vehicle.
 - The use of a personal vehicle is cost beneficial to the State.

The employee must submit a cost/benefit analysis and a completed [Personal Vehicle Use Form](#) to the Transportation Manager. In preparing the cost/benefit analysis, the employee should consider all costs associated with reserving, parking, operating and returning a state-owned vehicle to the cost of operating a personal automobile. Refer to FM website <http://facmgt.jmu.edu/web> for instructions and forms on obtaining necessary certification. A Personal Vehicle Use Form, approved by the Transportation Manager, must be attached to the expense report in order to receive the higher mileage rate.

F. Travel Completion

1. The employee is responsible for providing the FM Payroll Services assistant with receipts for hotels, parking, shuttle service, tolls, etc. within three working days after their return. (Hotel receipts must show a zero balance to be processed.)
2. The Payroll Services assistant shall process travel reimbursement through the University system, ChromeRiver. This enables an employee to be reimbursed for the expenses incurred during travel. The employee, his/her immediate supervisor and the Budget Manager will receive notification to approve the travel expense reimbursement.
3. Reimbursements will be made to the employee's designated account via direct deposit (approximately two weeks after the approval.)

V. RESOURCES

[JMU Policy 4401](#) – University Supported Travel



Facilities Management

FACILITIES MANAGEMENT
REQUEST FOR TRAINING,
CERTIFICATION/LICENSE & PROFESSIONAL
MEMBERSHIPS

Form to be submitted when requesting training, seminars, (internal and external), certifications/licenses (new or renewals), professional memberships, subscriptions, code books, etc. Attach documentation providing information on course content, fees, lodging costs, dates, location, dues, etc. Employee shall receive supervisor/manager's approval prior to submitting to Payroll Services Assistant for processing.

Name _____ Date _____ PSoft # _____ Pos. # _____ Org. # _____
 Title of Course/Seminar _____ Acct # _____
 JMU Sponsored Yes No
 Justification _____
 Requested class for license _____ renewal or _____ new Renewal Fee for Class/License \$ _____
 Dates: _____ Location _____ Depart/Return _____
 Registration \$ _____ Hotel \$ _____ Meals \$ _____ Other \$ _____ Total \$ _____
 Membership/Subscription/Code Books \$ _____ renewal or _____ new
 Web Address _____
 If flying, name as it appears on driver's license _____ Date of Birth _____
 Motor Vehicle Rental Needed? Yes No
 Pool Car Yes No _____ Uber or taxi
 DMV Paperwork _____ Added in ChromeRiver _____

If traveling and registration fee is needed, submit a short summary on what will be learned and how it will benefit your position to the Payroll Services Assistant.

Upon approval, the Payroll Services Assistant will notify the employee, prepare/process required forms, register employee for class, make travel arrangements, renew subscriptions/memberships, order books, etc. Paperwork will be submitted to FM Accounting.

Upon return – Submit all receipts to the Payroll Services Assistant for processing a refund and reporting actual hours of training for credit. The Learning summary will need to be filled out upon your return if there was a registration fee for the training and if employed by the University for at least one year.

Hours of training _____; Copy of form/MyMadison instructions to associate on _____

James Madison University Learning Summary

Name of Traveler: Click here to enter text.

Conference Name: Click here to enter text.

Employee ID: Click here to enter text.

Conference Dates: Start Date - End Date

Department: Click here to enter text.

Location: Click here to enter text.

What did you learn? Click here to enter text.

How will it benefit you in your position? Click here to enter text.

How will it benefit JMU? Click here to enter text.

Sessions/Workshops Attended:

- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.
- Click here to enter text.