

NEW TRAVEL REQUEST/CLAIM FORM PROCEDURES

Travel Request and Claim Form:

This new form combines the Travel Request and Claim on one page found on the Financial Services website, <http://www.csustan.edu/FinancialServices/Travel/index.html>

Different tabs (Request-Claim, Meal Report, and Mileage) aid in completing the Excel Request/Claim document. *If you complete the Meal Report and Mileage Report first, expenses will propagate automatically to the Request/Claim.*

- Meal Report- List all meals for which you have receipts. *You will not be reimbursed for meals for which you do not have a receipt.*
- Mileage Report- Calculates the amount reimbursed for driving a personal car.
- A valid defensive driving certificate must be on file with Public Safety (copy to department staff) in order to qualify for mileage per diem funds when using a personal car.
<https://www.csustan.edu/ctpd/JobClassificationTrainings/DefensiveDriver.html>

1. Before Traveling:

The **Travel Request**, first half of form under “Anticipated Expenses” must be approved by the appropriate Delegated Authority (Any travel request **under \$1000** needs AVP/Dean signature; travel request **over \$1000** also needs VP signature). Please allow at least four weeks for this process.

Once the Request has been approved by the appropriate parties a copy of the Travel Request must be submitted to Accounts Payable, and the original remains in the department.

Department checklist showing the information that should be submitted with a travel request:

- ☐ Departure Date & Time
- ☐ Return Date & Time
- ☐ Destination/Purpose of Trip
- ☐ Full Transportation Itinerary
 - Driving Information
 - Flight Information
- ☐ Registration Information
- ☐ Lodging Information
- ☐ Acceptance Letter (if applicable)
- ☐ **Statement** regarding the professional nature of the travel and the benefit to your scholarly and professional advancement.
- ☐ If applying for Dean’s initiative, please attach the Initiative Guideline Checklist.
- ☐ An explanation of what arrangements have been made for any classes that will be missed should be described in the Remarks & Details section.

If staff will be assisting you with travel, all of the information on the department checklist is required at least four weeks before departure

2. Dean's Teaching Initiative - Applying for funding from the Dean's office requires the following:

- Everything on the department checklist above.
- Deans Initiative Guidelines Checklist for the current AY.
- Statement outlining the professional nature of the travel and benefit to your professional achievement.
- Written confirmation of acceptance of your paper, presentation or role in the conference.
- Original Travel Request

[Web link not available at this time]

3. After Traveling:

Within 30 days of return, submit **Travel Claim**, second half of form under "Actual Claim."

Additional signatures by the appropriate Delegated Authority will be needed to approve claim if claim amount is greater than amount requested.

Original receipts for actual meal expenses itemizing the food and drink purchases must be submitted with the Claim. If a receipt is not included there will be no reimbursement.

4. Contact with questions or concerns:

Department of English -

Tula Mattingly, Administrative Support Coordinator, 209-667-3361, TMattingly@csustan.edu.

College of Arts, Humanities and Social Sciences -

Jeannie Thompson, Financial Assistant, 209-664-6811

Financial Services -

Lucero Mascorro, 206-667-3654

Note: Traveling out of the Country: If you are traveling abroad, it is **IMPORTANT** to review the "International Travel" process on the Risk Management web page:

<http://www.csustan.edu/RiskManagement/InternationalTravel/ForeignTravelInsProgram.html>