Introduction to Campus Travel Procedures

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TRAVEL AUTHORIZATION & PREPAYMENT REQUEST

TRAVEL AUTHORIZATION (Page 1)
- Traveler (State employee) must submit an approved Travel Authorization to Travel Operations prior to travel date regardless of funding source
- Chartfield (in-state 606001, out-of-state 606002, international 660802)
- Travel prepayment for registration fee (copy of registration form must be attached to Travel Authorization)
- Travel document is required prior to charging travel expenses to a University issued Procurement Card
- Driving requirements (STD 261, INF 254, Defensive Driver Training)
- Foreign travel liability insurance – contact Risk Management x7346
- Traveler’s signature and approvals (must be original)

ADDITIONAL REQUIRED APPROVALS ON TRAVEL AUTHORIZATION
- International
- Registration fee over $500
- More than two attendees

TRAVEL AUTHORIZATION (Page 2)
- Substitute Traveler

ADDITIONAL FORMS
- Request for Exception to Travel & Equipment Restrictions form (required if the fund is THEFD) – Academic Affairs Division Only
- Statement of Certification for Student Travel – (Student employee)
BLANKET TRAVEL AUTHORIZATION

BLANKET TRAVEL AUTHORIZATION - new form
- Travel within California and only used for:
  - Business meals charged to a P-Card
  - Mileage
  - Parking
- Department ID (only one Dept ID permitted)
- Chartfield
  - Required: account, fund, and department
  - Optional: program, class, project
- Traveler’s signature and approvals (must be original)

ADDITIONAL FORMS
- Request for Exception to Travel & Equipment Restrictions form
  - Required if the fund is THEFD and Academic Affairs Division Only
  - Must include name of individual(s) for whom exception is required or attach a list of names to the Exception form
- Statement of Certification for Student Travel – (Student employee)
TRAVAL EXPENSE CLAIM

TRAVAL EXPENSE CLAIM
• Traveler (State employee) must submit an approved Travel Expense Claim to Travel Operations within 30 days from the return date
• Change of Address
  ➢ Notify Travel Operations via email or check box on Travel Expense Claim
• Expenses paid by University or charged to a P-Card must be deducted (12)
• Traveler’s signature and approvals must be original
• Approval in box (19) for business expenses over $25 (excluding registration fee)
• Receipts
  ➢ Paid by traveler - Original receipt showing proof of payment
  ➢ Charged to Procurement Card - Copy of receipt showing proof of payment
• Supporting documentation
  ➢ Agenda, program, email or flyer
  ➢ Research Travel – Statement of Purpose form

NEW EXCEL FORM – CalState Teach Faculty
• Type Used (8B) - see section 15 for list of codes
Important Websites

Travel Operations
http://finance.fullerton.edu/Controller/Travel/

Travel Forms
http://finance.fullerton.edu/Controller/AccountsPayable/Forms/

Travel Operations email: travel@fullerton.edu
Questions
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