How to complete a Request for Authorization to Travel form (Domestic Travel)

1. Complete a Travel Authorization form

   Link to Request for Authorization to Travel form: [http://www2.humboldt.edu/forms/node/316](http://www2.humboldt.edu/forms/node/316)

   If someone else needs to be cc’d with the travel authorization number, indicate a travel arranger’s name and email address.

   If a travel advance is needed, indicate travel advance amount, purpose of advance, and attach supporting documents.

   ![Travel Authorization Form]

   ![Travel Advance Requested]

   ![Purpose of Advance]

   ![Comment/Spacial Instructions]

   Sign/Date in the “Traveler’s Signature” section

2. Obtain approval signature(s)

   May be approved/signed by the authorized administrator responsible for the budget unit that is covering the travel expense or your immediate supervisor.

   (Note: International travel requires approval by the International Center Director and the campus President. In some cases also requires the Chancellor’s approval. To request International Travel, use the Request for International Travel form.)

3. Submit the travel authorization form to SBS 345

   Ideally, the original should be submitted to Business Services Office (SBS 345), however a copy may be emailed to travel@humboldt.edu or faxed to 826-5703 if a travel authorization number is needed right away. (Then send the original via campus mail to SBS 345 with a note that a copy was previously submitted to avoid a duplicate travel authorization number from being issued.)
How to complete a Request for International Travel form

1. **Complete a Request for International Travel form**
   - **Link to Request for International Travel form:** [http://www2.humboldt.edu/forms/node/564](http://www2.humboldt.edu/forms/node/564)
   - If someone else needs to be cc’d with the travel authorization number, indicate a travel arranger’s name and email address.
   - If a travel advance is needed, indicate travel advance amount, purpose of advance, and attach supporting documents.
   - **Sign/Date in the “Traveler’s Signature” section**

   ![Request for International Travel form]

   → **It’s recommended to register with STEP**

2. **Obtain approval signature**

   - **International travel requires approval by the International Center Director and the campus President. In some cases also requires the Chancellor’s approval.**

3. **Submit the travel authorization form to SBS 345**
   - Give a copy to Contracts & Procurement/Risk Management to process foreign travel insurance.
   - Ideally, the original should be submitted to Business Services Office (SBS 345), however a copy may be emailed to travel@humboldt.edu or faxed to 826-5703 if a travel authorization number is needed right away. (Then send the original via campus mail to SBS 345 with a note that a copy was previously submitted to avoid a duplicate travel authorization number from being issued.)
### How to book travel through CalTravelStore

1. **Call CalTravelStore**
   
   (916) 376-3989 option 42

   CalTravelStore is the only State of California agency that is able to book state airfare rates. They can also book rental car and hotel/lodging. (You will be asked to provide credit card information in order to hold the hotel/lodging reservations.)

   NOTE: *You may still call Giselle’s Travel (if you prefer) at (800) 523-0100, however they will not be able to obtain state airfare rates.*

2. **Provide the following information to CalTravelStore agent**
   - Name of traveler (as it appears on the government issued ID the traveler will be using when checking in with the airlines)
   - Date of birth
   - Travel Authorization Number (which you should have already obtained from HSU’s travel office when you submitted the Travel Authorization form.)

3. **Travel agency service fee**
   - CalTravelStore’s service fees:
     - Agent assistance (over the phone): $14
     - Booked online via Concur (soon to be available): $9
   - Giselle’s Travel service fees:
     - Agent assistance (over the phone): $15
     - If booked using online request form: $10
How to complete a Travel Expense Claim form (for Domestic Travel)

1. Fill out Claimant’s (traveler’s) information on the top section of the form.

   **TRAVEL EXPENSE CLAIM**
   
   Claimant’s Name: SALLY B. TRAVELER
   HSU ID: 01019876
   Phone Number: 826-3127
   
   Recruiter: Admissions
   Position/Title: 
   Address (campus or residential): 
   City: State: Zip:

   If traveler is other than staff/faculty/admin, include the mailing address and phone number.

2. Log expenses already paid by HSU or directly billed to HSU in the “Purchased by University” section.

   If airfare was booked through CalTravelStore, be sure to include the service fee in the airfare amount. ($14 for agent assisted travel booking.)

   **Purchased by University**
   
<table>
<thead>
<tr>
<th>Item/Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare &amp; registration fee</td>
<td>$535.70</td>
</tr>
<tr>
<td>Arcata to Los Angeles</td>
<td>$200.00</td>
</tr>
<tr>
<td>Total</td>
<td>$735.70</td>
</tr>
</tbody>
</table>

   **Subtotal:** $735.70

3. Indicate daily expenses in the appropriate line/column.

   Use this box to explain expenses and provide additional information or instructions.

   **If claiming mileage for use of personal/private vehicle, indicate vehicle license plate #:** XYZ2354

   **Note:**
   - Lodging receipt needs to be itemized.
   - Any expense $25 and above requires an itemized original receipt:
     - Meal receipt needs to be itemized and may include tip in the expense.
     - If meal receipt contains alcoholic beverage, deduct the alcohol charge (and applicable taxes) from the receipt and claim the appropriate amount.
     - If meal charge is included in hotel receipt, log the meal expense under the appropriate meal column.
   - If claiming mileage (for personal vehicle), be sure to indicate your vehicle license plate number.
   - Gas receipt should be for rental car only. Mileage is for use of personal vehicle.
   - If you received a cash advance prior to travel, indicate that amount on the bottom of the Travel Expense Claim in the “Less any cash advance provided prior to trip:” field.

   **Breakfast/lunches provided at the conference. Mileage for travel from home to airport.**

   **Meal expenses being claimed does not include alcoholic beverage(s)**

   **Total Travel Claim:** $1,837.67
   Less amount already paid by HSU: $911.58
   Subtotal: $926.09
   Less any cash advance provided prior to trip: $1,006.09
   Amount to be reimbursed to traveler: $1,006.09

   **Remarks/Details**
   - Lodging receipt needs to be itemized.
   - Any expense $25 and above requires an itemized original receipt.
   - Meal receipt needs to be itemized and may include tip in the expense.
   - If meal receipt contains alcoholic beverage, deduct the alcohol charge (and applicable taxes) from the receipt and claim the appropriate amount.
   - If meal charge is included in hotel receipt, log the meal expense under the appropriate meal column.
   - If claiming mileage (for personal vehicle), be sure to indicate your vehicle license plate number.
   - Gas receipt should be for rental car only. Mileage is for use of personal vehicle.
   - If you received a cash advance prior to travel, indicate that amount on the bottom of the Travel Expense Claim in the “Less any cash advance provided prior to trip:” field.
<table>
<thead>
<tr>
<th>4. If no travel authorization number or if only claiming mileage, provide the chartfield information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chartfield:</strong></td>
</tr>
<tr>
<td>Account</td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. Sign the form and obtain approval signature</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HEREBY CERTIFY:</strong> That a) I received authorization to travel; b) this travel was necessary to conduct official business; c) expenses are true and accurate in accordance with HSU Travel Policy and procedures; d) I will not seek reimbursement from any other source; e) if requesting mileage reimbursement, I have satisfied the State Defensive Driving requirements, if necessary.</td>
</tr>
<tr>
<td><strong>Date:</strong></td>
</tr>
<tr>
<td><strong>Signature of Traveler:</strong></td>
</tr>
<tr>
<td><strong>Approval Signature:</strong></td>
</tr>
<tr>
<td><strong>Date:</strong></td>
</tr>
<tr>
<td><strong>Approver Name:</strong></td>
</tr>
<tr>
<td><strong>Approval Signature:</strong></td>
</tr>
<tr>
<td><strong>Date:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6. Attach receipts and send to Business Services/SBS 345</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tip:</strong></td>
</tr>
<tr>
<td>• Since all documents are fed through a scanner, please “tape” smaller receipts to a letter-sized paper. (When taping receipts, please do not tape over printed areas since the tape may ruin the printed information.)</td>
</tr>
</tbody>
</table>
How to complete a Travel Expense Claim form (for International Travel)

1. Fill out Claimant’s (traveler’s) information on the top section of the form

   Link to Travel Expense Claim form: [http://www2.humboldt.edu/forms/node/90](http://www2.humboldt.edu/forms/node/90)

   **TRAVEL EXPENSE CLAIM**

   - **Claimant’s Name**: SALLY B. TRAVELER
   - **ID**: 01019876
   - **Phone Number**: 826-3127
   - **Position/Title**: Department
   - **Recruiter**: Admissions
   - **Address (campus or residential)**: City
   - **State**: Zip

   **Travel Authorization Number**: 01112345

   **Date received in 202**: 15

   If traveler is other than staff/faculty/admin, include the mailing address and phone number.

2. Log expenses already paid by HSU or directly billed to HSU in the “Purchased by University” section

   If airfare was booked through CalTravelStore, be sure to include the service fee in the airfare amount.

   **Purchased by University**

<p>| LISTED ITEMS ALREADY PAID BY HSU/DIRECTLY BILLED TO HSU (AIRCARE, RENTAL CAR, HOTEL, CONFERENCE FEE PAID) |</p>
<table>
<thead>
<tr>
<th>START LOCATION</th>
<th>END LOCATION</th>
<th>LODGING</th>
<th>RENTAL CAR</th>
<th>AIRFARE</th>
<th>REGISTRATION FEE</th>
<th>OTHER BUSINESS EXPENSES</th>
<th>TOTAL EXPENSES FOR DAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arcata</td>
<td>Los Angeles</td>
<td></td>
<td></td>
<td>$515.70</td>
<td>$200.00</td>
<td>$735.70</td>
<td>$735.70</td>
</tr>
</tbody>
</table>

   **Subtotals**: $515.70 $200.00 $735.70

3. Indicate daily expenses in the appropriate line/column.

   **If claiming mileage for use of personal/vehicle, indicate vehicle license plate #: X1223594**

   **Purchased by Employee**

<table>
<thead>
<tr>
<th>DATE</th>
<th>LOCATION(S) OF EXPENSE</th>
<th>MEALS</th>
<th>AIRFARE</th>
<th>RENTAL CAR &amp; FUEL</th>
<th>TAXI, TOLLS, SHUTTLE, PARKING</th>
<th>PRIVATE CAR USE</th>
<th>REGISTRATION FEE</th>
<th>OTHER BUSINESS EXPENSES</th>
<th>TOTAL EXPENSES FOR DAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/13/15</td>
<td>Arcata to Los Angeles</td>
<td>$155.75</td>
<td>$12.95</td>
<td>$7.90</td>
<td>$250.00</td>
<td>$200.00</td>
<td>12</td>
<td>$135.75</td>
<td>$6.90</td>
</tr>
<tr>
<td>05/13/15</td>
<td>Los Angeles</td>
<td>$155.75</td>
<td>$12.95</td>
<td>$7.90</td>
<td>$200.00</td>
<td>$155.75</td>
<td>$5.00</td>
<td>$171.37</td>
<td></td>
</tr>
<tr>
<td>05/13/15</td>
<td>Los Angeles</td>
<td>$155.75</td>
<td>$12.95</td>
<td>$7.90</td>
<td>$200.00</td>
<td>$155.75</td>
<td>$5.00</td>
<td>$201.22</td>
<td></td>
</tr>
<tr>
<td>05/14/15</td>
<td>Los Angeles</td>
<td>$155.75</td>
<td>$12.95</td>
<td>$7.90</td>
<td>$200.00</td>
<td>$155.75</td>
<td>$5.00</td>
<td>$211.40</td>
<td></td>
</tr>
<tr>
<td>05/15/15</td>
<td>Los Angeles to Arcata</td>
<td>$19.78</td>
<td>$7.00</td>
<td>$250.00</td>
<td>$12.00</td>
<td>$45.00</td>
<td>12</td>
<td>$155.75</td>
<td>$6.90</td>
</tr>
</tbody>
</table>

   **Subtotals**: $621.60 $137.20 $35.90 | $50.00 | $32.00 | $125.00 | 24 | $13.80 | $1,066.60

   **Meal expenses being claimed does not include alcoholic beverage(s)**

   **Note:**
   - Lodging receipt needs to be itemized
   - Any expense $25 and above requires an itemized original receipt
     - Meal receipt needs to be itemized and may include tip in the expense
     - If meal receipt contains alcoholic beverage, deduct the alcohol charge (and applicable taxes) from the receipt and claim the appropriate amount
     - If meal charge is included in hotel receipt, log the meal expense under the appropriate meal expense
     - Put a check mark in the box next to “Meal expenses being claimed does not include alcoholic beverage(s)"
   - If there are parking charge(s) or internet charge(s) on the hotel receipt, log those expenses separately under the appropriate column.
     - Hotel internet – log it under “Other Business Expense” column
     - Parking – log it under “Taxi, Tolls, Shuttle, Parking” column
     - Room service – log it under the appropriate meal column – be sure to also include an itemized receipt for the meal and to remove any alcohol charges
   - If claiming mileage (for personal vehicle), be sure to indicate your vehicle license plate number
   - Gas receipt should be for rental car only. Mileage is for use of personal vehicle.

   → Use this box to explain expenses and provide additional information or instructions
4. If no travel authorization number or if only claiming mileage, provide the chartfield information

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<th></th>
<th></th>
<th></th>
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</tr>
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<tbody>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td></td>
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</tr>
<tr>
<td>Department</td>
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</tr>
<tr>
<td>Program</td>
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</tr>
<tr>
<td>Class</td>
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<td></td>
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5. Sign the form and obtain approval signature

<table>
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<tr>
<th>Statement</th>
<th>Approver Name</th>
<th>Approval Signature</th>
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