

## College of Education- Travel Request Checklist

\*Keep in mind, purchases made before a travel request is approved may not be reimbursable. Reimbursement will only be provided for eligible approved expected expenses listed on an approved travel request.

### Initial Submission:

**\*It is critical to adhere to COE Travel deadlines. A travel request must be submitted to the Chair for approval on Concur (or to emailed [coetravel@fullerton.edu](mailto:coetravel@fullerton.edu) for paper requests) before the 45/60/90 day deadlines. After initial submission, it may take up to 5 business days for the travel coordinator to review and communicate any revisions that may be needed. It is critical that the traveler completes the necessary revisions within 5 business days. Initial submissions should include all the listed items in this checklist for efficient processing.**

-Initial submission of travel requests must be submitted by the traveler prior to COE travel deadlines. The initial submissions may need revisions. It is recommended that the traveler submit a travel request as soon as possible (while waiting for presentation acceptance). It is a simple process to cancel a travel request if travel is not going to occur.

-Email [coetravel@fullerton.edu](mailto:coetravel@fullerton.edu) regarding all travel questions.

- Travel policies require expense reports/claims for reimbursement to be submitted within 60 days after travel has been completed. Travel expense claims will need to be submitted via the same medium as the request (Concur or emailed to [coetravel@fullerton.edu](mailto:coetravel@fullerton.edu) )

### Funding Information:

Depending on the funding that you will be using, one of the following options will be used:

1. All stateside funding: Submitted on Concur
2. Combination Stateside and ASC/Philanthropic funding: Submitted on Concur and use "AUX ORG Split Funding"
3. All ASC/Philanthropic funding: Paper travel request
4. Student travel: Paper travel request
5. Personal funding: Submit a \$0 request on Concur with paperwork for recordkeeping.

\*Paper requests will be emailed to [coetravel@fullerton.edu](mailto:coetravel@fullerton.edu)

### Completed Submission:

-All **completed** travel paperwork should be submitted before the following deadlines:

-Domestic Travel: **45 days**

-Conference Travel with Exhibit booth: **60 days**

-International Travel: **90 days**

-A completed travel packet means all necessary and accurate information is inputted, attached, and submitted. All the listed items in the below checklist must be included for it to be "complete".

-Completed travel requests will be routed for approval. Status can be viewed by the traveler in Concur. If the request is sent back, reach out to COETravel if you have questions on the revisions.

-[Concur video trainings on creating travel requests.](#)

## All travel requests must have:

- Basic information:
  - Title of travel format: Month (three letters) Year City, State
    - JAN 2024 Los Angeles, CA
    - If international, only have country (JAN 2024 Canada)
  - Purpose of travel.
  - Travel dates and locations.
  - Any personal travel dates and locations.
  - Information and chart-fields for all funding sources that will be used.
    - If multiple funding sources will be used, comment how much from each will be used.
  - Does hotel room rate exceed \$275/night?
    - Is this a conference hotel?
- Common possible expected expenses:
  - Registration
  - Hotel/Lodging
  - Airfare
  - Meals (Using “Meals and Incidentals per Diem”)
    - If paper travel, look up and attach rates from government website:
      - Domestic: [U.S. General Services Administration](#)
      - Hawaii, Alaska, International: [Defense Travel Management Office](#)
  - Parking (at conference, airport, or destination)
  - Mileage (roundtrip)
  - Taxi/Shuttle (local and at conference location)
- Attachments needed:
  - Travel estimate form
  - University Related Travel Form (Missing Class Form) **\*\*Must be signed by Department Chair**
  - Conference flyer with dates of conference
  - Registration fee chart for the conference
  - If presenting, invitation letter(s) to present
  - If special award or grant funding awarded, email with approval amount and chart-fields
  - If staying at a conference hotel, a flyer/screenshot from the conference that lists the hotel
  - If international travel, you will need international travel insurance. This will need to be requested and reviewed by Risk Management first before submission of travel request. Email approval from Risk Management will need to be attached. [Risk Management Insurance request](#)
  - \*Receipts are not attached on the travel requests, it will need to be attached on the expense report

**\*Make sure to click submit at the top right corner of the request to submit the request for approval. Before clicking submit and getting a confirmation page, the request can only be viewed by the traveler.**

If you are using the Dean’s Travel Award, please review the Dean’s Travel Award Process and Procedures on [COE Travel website](#).