

Travel Approval

Travel Policies and Procedures

CSUF College of Education

Prior to Travel:	
DOMESTIC TRAVEL	Complete the Travel Request in Concur at least 30 days for Virtual Travel and 45 days for in-person travel; prior to the first day of your travel departure date.
INTERNATIONAL TRAVEL	Complete the Travel Request in Concur and submit with required backup at least 90 days prior to the first day of your travel departure date. * Study Abroad travel for students requires 90 days*

***Late travel and/or incomplete travel requests will not be accepted. You can always notify coetravel@fullerton.edu and cancel.**

Concur Travel Approval

1. **Create new travel request in Concur:** See [concur travel guide](#).

If you are not sure of the account number to be charged, consult with your Department Chair before submitting the form to avoid delays in processing.

*** Please note that you must be presenting at an academic event to use the Dean's Travel Award. ***

- APA citation must be noted in the comments section of request. Request will be considered incomplete without this.

- a) Please indicate if personal travel will be taken (if so, please specify date(s) and location(s))
 - b) Lodging cannot exceed **\$275 per night** (an itemized receipt showing a zero balance will be required for your expense claim). Please note that if you choose to stay at an Airbnb, only the room rate and tax is covered, you will not be reimbursed for any additional costs such as a cleaning fee.
 - c) Meals cannot exceed **\$55 per day** (itemized receipts will be required for your expense claim and alcohol cannot be reimbursed)
2. **Copy of conference information:** A document or screenshot from conference website that includes the name of event, the exact dates and location (a link to the conference is not acceptable).
 3. **Copy of registration fee pricing:** Any documentation that includes the registration fee for the event. You should not purchase registration before your TR# has been assigned. Be sure to include details regarding which meals are included in the event, if any. A link to the registration page is not acceptable.
 4. **Copy of presentation acceptance** (if applicable).
 5. **Travel liability insurance:** **If traveling abroad**, you must submit a request for liability insurance, found here: <https://hr.fullerton.edu/risk-management/travel/foreign-travel/foreign-travel-liability-insurance.php>. Please check that you are submitting the accurate information and include any

personal dates, if applicable. A copy of the confirmation email must be included with travel request packet.

6. **Travel Review Checklist Form** - If your travel falls into one of the categories listed below, the President's signature is required and you will need to complete the Travel Review Form found here: <http://ed.fullerton.edu/resources/pdfs/travel-review-form.pdf>.

- Travel request in an amount over \$4,000
- International Travel
- Exception for any transportation other than most traveled or most economical
- Exception for reimbursement of lodging within 25 miles of traveler's residence
- Exception for spouse or partner to accompany when serves a business purpose
- Exception for travel to a banned state (if stateside travel)

On the form, the traveler should fill out the date, the reason that the president's approval is needed, and name at the bottom of the form. The chair will initial when signing the rest of the documentation. This form needs to be submitted to coetravel@fullerton.edu with the original travel estimate form. A wet signature is required but this may be submitted without signature and then signed at the same time the travel request form is signed.

7. **Submit Request for approval:** Travel coordinator will review to ensure all forms and information is correct. If request needs to be edited, you will be notified. Once request is ready, travel coordinator will indicate the request is ready for dept. chair approval.
8. **A Travel Request Application Request will move through the college workflow.**
9. **Travel Authorization Number (TR#)** will be assigned once request has been fully approved and you may begin booking your trip. **Any expenses paid prior to receiving a TR# will not be reimbursed if travel is not approved.**

*****Virtual Travel*****

10. **Travel Request Form** will be routed for internal COE approval. Once Travel Request Packet is approved email confirmation will be sent to traveler, attached will be the finalized Travel Request Packet.

Traveler must include final approved packet to travel Reimbursement Request

Date/Location Change & Travel Cancellation

Please email coetravel@fullerton.edu to notify any travel change in date, location, or trip cancellation.

Please note: Failing to follow these instructions may delay or prohibit travel and reimbursement for travel.