

Traveler's Checklist

Before You Travel:

- _____ Read and understand the CSU Travel Policy
<http://www.calstate.edu/icsuam/sections/3000/3601.01.shtml>
- _____ Travel Authorization Form completed and signed by approving official
The approved Travel Authorization Form must be submitted with your Travel Expense Claim Form.
- _____ Form STD 261-Authorization to Use Privately Owned Vehicles and Defensive Drivers Training certification are on file (if required).
https://ds.calstate.edu/?svc=skillsoft&org=M_EHS
Use CMA login and password, select <CATALOG> then *Defensive Driving Fundamentals*
- _____ CA travel: Always carry a Hotel/Motel Transient Occupancy Tax Waiver Form. Most hotels grant the waiver with a valid ID. (save your budget dollars)
- _____ Make airfare, hotel and if needed auto rental reservations using your campus Pro Card if possible.

During and After Travel:

- _____ All traveler's must *obtain receipts that document the check-in and check-out dates, the itemized expenses incurred, and the total amount paid.*
- _____ Reimbursable mileage is computed from either the campus or home, whichever is the shorter distance; Print out an internet map to document the distance claimed.
- _____ Save your original itemized receipts. A receipt without detail is NOT sufficient.
 - Lodging receipts must show your name, itemized charges for the time period, and that payment was made, not that payment is due. (e.g., zero balance*, paid in full, charged to a credit card.
 - Restaurant receipts must show details of what was purchased
 - Registration receipts must state name of conference/meeting, date of event, reflect amount paid, an itemization of any other associated costs, and indicate payment was received.
- _____ Save your course agenda.
*Meals included in registrations/meetings/conference's or paid by another source as part of a group cannot be claimed; please indicate '**provided**' in the appropriate field.*

Travel Expense Claim form and all original receipts related to reimbursement must be submitted within 30 days of your return. Each trip should be listed on a separate form and must include ALL trip expenses, including those paid by procard.