Travel Request Checklist

This document is to explain the two different kinds of Travel Requests that can be completed in Concur. In each of these Travel Requests, there are certain requirements on which Travel Request is appropriate to use, and how it can be completed. The two kinds of Travel Requests are:

- Travel Request
- Blanket Travel Request

Note: If you are creating an international travel request, please refer to the Travel Request International Quick Guide, as this checklist focuses on domestic travel only and within 48 states, except for Alaska & Hawaii. All types of travel require a travel request to be submitted and approved.

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Travel Request

Reminders: A Travel Request will be required if the traveler travels domestically and within 48 states, except for Alaska & Hawaii. You must identify estimated travel expenses that will be incurred throughout the trip. To ensure you comply with Travel policies, ask your budget coordinator to provide an amount that is allowed for your department to spend on your travel expenses.

Checklist

☐ Trip destination is clearly stated
☐ Reviewed Header tab
  – Appropriate options were selected on the following fields:
  ➢ Request Policy— selected State Approve then Book
  ➢ Request/Trip Name— correct naming convention
    • [Month] [Year] [Destination]
    • Example: SEP 2017 San Diego, CA
  ➢ How will you book your travel?
  ➢ Will hotel cost exceed $275 per night? — Selecting Yes requires entering a comment to explain why the hotel cost exceeds $275
  ➢ Trip Type
  ➢ Start Date
  ➢ End Date
  ➢ Report/Trip Purpose
  ➢ Traveler/User Type
  ➢ Purpose
  ➢ Main Destination City
  ➢ State
  ➢ Regions Traveling To
  ➢ Does this trip contain personal travel? — If yes, provide personal dates and location in comment box
  ➢ Comment— include reasons of hotel cost exceeding $275, and personal dates and location (if applicable)
  ➢ Division
  ➢ Department ID
  ➢ Fund

☐ Reviewed Segments tab
  – Estimated amount was selected appropriately
  – Estimated amount is within department’s budget
Reviewed Expenses tab
  – Estimated amount was selected appropriately
  – Estimated amount is within department’s budget

Ensure these estimated travel expenses have been added (*if applicable to the traveler’s trip*) and reviewed:

- Airfare / Airline Fees (Baggage, Wifi, etc.)
- Lodging
- Car Rental / Car Rental Gas
- Mileage
- Actual Per Day Meal Expense
- Actual Incidentals Per Day
- Registration Fee / Workshop
- Registration form must be attached (*if applicable*)
- Parking Fee, Tolls
- Taxi / Shuttle
Blanket Travel Request

Reminders: A Blanket Travel Request will be required if the traveler requests to go on a business trip less than 24 hours in California, within a fiscal year (July 1st – June 30th). Blanket Travel estimated expenses will only apply to parking, mileage, tolls, and approved business meals with official University guest.

Checklist

- Trip destination is clearly stated
- Reviewed Header tab
  - Appropriate options were selected on the following fields:
    - Request Policy— selected State Approve then Book
    - Request/Trip Name— correct naming convention
      - Blanket Travel FY [Year-Year]
      - Example: Blanket Travel FY 2017-2018
    - How will you book your travel? — selected Request for Offline/CTP Booking
    - Will hotel cost exceed $275 per night? — selected No
    - Trip Type— selected In-State
    - Start Date— selected July 1st, 2017 (use appropriate fiscal year)
    - End Date— selected June 30th, 2018 (use appropriate fiscal year)
    - Report/Trip Purpose— selected Blanket Travel (Mileage/Parking/Tolls)
    - Traveler/User Type
    - Purpose— entered Blanket Travel within California for FY17-FY18 (use appropriate fiscal year)
    - Main Destination City— entered Fullerton, California
    - State— entered California
    - Main Destination Country— entered United States
    - Regions Traveling To
    - Division
    - Department ID
    - Fund
- Reviewed Expenses tab
  - Estimated amount was selected appropriately
  - Estimated amount is within department’s budget
Select applicable travel expense(s):

☐ Personal Car Mileage (make sure the mileage is within the distance allowed)
☐ Parking Fee
☐ Tolls (*excludes FastTrak, Fast Lane, or equivalent*)
☐ Approved business meals with official University guest charged to a Procurement Card