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 quick guide focuses on domestic travel only.

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Travel Request

Reminders: A Travel Request will be required if the traveler requests to go on a University business trip for more than 24 hours. 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

☐ Correct Naming Convention
  – [Month] [Year] [Destination]
  – Example: SEP 2017 San Diego, CA
☐ Trip destination is clearly stated
☐ Personal Travel Details included (if applicable)
☐ Reviewed Header tab
  – Appropriate options were selected on the following fields:
    ➢ Request Policy
    ➢ Request/Trip Name
    ➢ How will you book your travel?
    ➢ Will hotel cost exceed $275 per night?
    ➢ 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?
    ➢ 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
- Agenda or Program Flyer is attached for any conferences you attended
- 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 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**

- Correct Naming Convention
  - Blanket Travel FY [Year-Year]
  - Example: Blanket Travel FY 2017-2018
- Trip destination is clearly stated
- Personal Travel Details included (if applicable)
- Reviewed Header tab
  - Appropriate options were selected on the following fields:
    - Request Policy
    - Request/Trip Name
    - How will you book your travel?
    - Will hotel cost exceed $275 per night?
    - 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?
    - Division
    - Department ID
    - Fund

- Reviewed Expenses tab
  - Estimated amount was selected appropriately
  - Estimated amount is within department’s budget
Ensure at least one of these travel expenses have been added:

- Personal Car Mileage (make sure the mileage is within the distance allowed)
- Parking Fee
- Tolls
- Approved business meals with official University guest charged to a Procurement Card