



Travel Operations  
College Park 300  
Email: [travel@fullerton.edu](mailto:travel@fullerton.edu)

### **Checklist for the Blanket Travel Authorization and Travel Expense Claim**

**Blanket authorization for mileage, self parking, toll, and approved business meals (excluding alcohol beverages and tobacco) charged to a Procurement Card  
Directive 11 is required for business meals**

**Travel Expense Claim for blanket travel must be submitted on a monthly basis and only for the travel dates for that month.**

If the traveler is currently employed by CSU Fullerton (state employee), submit approved Blanket Travel Authorization Form (blanket authorization in California for travel dates within a fiscal year) to Travel Operations, CP-300. The fiscal year is from July 1st to June 30th.

The Travel Authorization Blanket [Excel] Form is located on the Travel Operations website under Travel Forms. The link is: <http://finance.fullerton.edu/Controller/AccountsPayable/Forms/Default.aspx#Travel>

### **Department and Preparer Information:**

- Fiscal Year
- Division
- Department Name
- Department ID (only one Department ID permitted)
- Purpose
- Select One: Original or Revision
- Preparer's Name
- Preparer's Phone No.
- Preparer's Email

### **Traveler Information:**

1. **CSUF Employee Name**  
Type the first and last name for each CSUF employee.
2. **CWID Number**  
Type the employee's CWID number.
3. **Chartfield (account-fund-department-program-class-project)**  
Fill in the required fields (account – use 606001).
  - The required fields are account (6), fund (5), and department (5).
  - The optional fields are program (4), class (5), and project (8).
4. **Estimated Amount**  
Fill in the estimated amount for only mileage, parking, toll, and business meals charged to a Procurement Card.

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5. Maximum Amount Allowed (optional)

If a Department does not wish to exceed a maximum amount, **fill in the maximum amount.**  
Leave blank if no maximum amount.

6. Employee's Signature (agree to terms below)

The traveler's signature is required (signature must be original).

7. Date

Fill in the date the traveler signed the form.

8. Check if Private Vehicle or University Vehicle

Private Vehicle:

- The mileage reimbursement rate is 0.50 per mile for travel on January 1, 2010 through December 31, 2010.
- On a scheduled work day, traveler departs and/or returns to their residence, mileage is calculated:
  - From the lesser of the two locations (traveler's headquarters or traveler's residence).
- On a scheduled work day, traveler departs from their headquarters and/or returns to their headquarters, mileage is calculated:
  - From the traveler's headquarters to destination or from destination to traveler's headquarters.
- On a scheduled date off, mileage is calculated:
  - From the traveler's residence.

University Vehicle (only for University Police, Physical Plant, etc.):

[Discontinuation of Campus Motorpool](#)

9. Driving Requirements

Private Vehicle:

- **AUTHORIZATION TO OBTAIN DRIVING RECORDS FROM THE DEPARTMENT OF MOTOR VEHICLES** (INF 254) is required if a private vehicle or University vehicle will be used for travel. Submit the completed INF 254 form to University Police, UPD. A new INF 254 form must be submitted to University Police when the traveler's Driver License expires. [Click here.](#)
- **AUTHORIZATION TO USE PRIVATELY OWNED VEHICLES ON STATE BUSINESS** (STD 261) is required if a private vehicle will be used for travel. Submit a copy of the approved STD 261 form or renewal form with the required approval to Travel Operations (CP-300) every fiscal year (July 1<sup>st</sup> to June 30<sup>th</sup>). [Click here.](#) If driver's license has expired, please update driver's expiration date on STD. 261 form prior to submitting a renewal copy to Travel Operations.
- The **University approved Defensive Driver Training class** is required if a private vehicle or University vehicle will be used for travel. A Defensive Driver Training class must be taken every four years. If you have any questions about the class schedule or on-line training, send an email to Melissa Dominguez at [mdominguez@fullerton.edu](mailto:mdominguez@fullerton.edu).

University Vehicle:

- **AUTHORIZATION TO OBTAIN DRIVING RECORDS FROM THE DEPARTMENT OF MOTOR VEHICLES** (INF 254) is required if a private vehicle or University vehicle will be used for travel. Submit the completed INF 254 form to University Police, UPD. A new INF 254 form must be submitted to University Police when the traveler's Driver License expires. [Click here.](#)
- The **University approved Defensive Driver Training class** is required if a private vehicle or University vehicle will be used for travel. A Defensive Driver Training class must be taken every four years. If you have any questions about the class schedule or on-line training, send an email to Melissa Dominguez at [mdominguez@fullerton.edu](mailto:mdominguez@fullerton.edu).



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10. Accounts Payable/Travel Operations Use Only

Leave blank (completed by Travel Operations).  
If a "Revision" – fill in the travel document number.

11. Approval(s)

The required approver's signatures are required (all signatures must be original).

#### **Additional forms required**

- Academic Affairs Division Request for Exception to Travel & Equipment Restrictions – completed form must be attached to Blanket Travel Authorization for the Academic Affairs Division if the fund is THEFD
- Statement of Certification for Students Receiving University Funds for Travel – completed form must be attached to Blanket Travel Authorization for a student employee (employed by CSU Fullerton – state employee)

#### **Travel Expense Claim:**

- Effective July 1, 2007 a Travel Expense Claim for blanket travel must be submitted to Travel Operations on a monthly basis and only for the travel dates for that month.
- Travel dates for different months must be listed on separate Travel Expense Claims and not combined on one Travel Expense Claim to avoid duplicate payments.
- Complete the **Monthly Mileage Details Form**. The Completed Monthly Mileage Details Form must be attached to Travel Expense Claim. The Monthly Mileage Detail [Excel] is located on the Travel Operations website under Travel Forms. The link is: <http://finance.fullerton.edu/Controller/AccountsPayable/Forms/Default.aspx#Travel>