Checklist for the Blanket Travel Authorization and Checklist for the Travel Expense Claim (blanket mileage)

The Blanket Travel Authorization is for travel within California, travel dates within a fiscal year and only to be used for the following expenses:

1) Mileage  
2) Self parking  
3) Toll  
4) Approved business meals (excluding alcohol beverages and tobacco) charged to a Procurement Card (approved Directive 11 required and must be attached to the Travel Expense Claim)

The fiscal year is from July 1st to June 30th.

Submit approved Blanket Travel Authorization Form to Travel Operations, CP-300.

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](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, student employee or student.

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 travel within California and only to be used for the following expenses: mileage, self parking, toll, and business meals charged to a Procurement Card.

Non-Reimbursable Expenses: FastTrack (or equivalent)
Exceptions for FastTrack expenditures that arise because of special or unusual circumstances must be documented and approved by the appropriate approving authority.

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 (employee, student employee or student) 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, 2011
- Expenses for travel between the traveler’s residence and normal work location (commuting expense) shall not be allowed
- 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

Non-Reimbursable Expenses: FastTrack (or equivalent)
Exceptions for FastTrack expenditures that arise because of special or unusual circumstances must be documented and approved by the appropriate approving authority.

University Vehicle (only for University Police, Physical Plant, etc.):
Discontinuation of Campus Motorpool

9. Check the Appropriate Box
Faculty / Staff
Student Employee
Student

10. 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 1st to June 30th). Click here. If driver’s license expiration date on form has expired, must update before submitting a renewal copy.
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.

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.

11. Accounts Payable/Travel Operations Use Only

Leave blank (completed by Travel Operations).

If a “Revision” – fill in the travel document number.

12. Approval(s)

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

Additional forms required

- For a CSUF student employee (state employee)
  - 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)
- For a CSUF student
  - 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)
  - Release of Liability, Promise Not To Sue, Assumption of Risk and Agreement To Pay Claims

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

Complete the Travel Expense Claim.
- Select the current mileage rate in box #15
- Type “Monthly Mileage Details Form attached” in column 4 on the first row and enter the total number of miles in column 8 (D)
- Enter any expenses for self parking, tolls or approved business meals charged to a Procurement Card (attach approved Directive 11 required ) in the appropriate column and day
- Non-Reimbursable Expenses: FastTrack (or equivalent)

Exceptions for FastTrack expenditures that arise because of special or unusual circumstances must be documented and approved by the appropriate approving authority