Travel
Reminders and Updates

Business Partners Round Table – August 17, 2011
Travel Claims

• Don’t forget to use the new Travel Claim form
  – Form and instructions have been updated for new Travel policy
  – We’re working on adding another tab with a sample Travel Claim

• Meals of $25 or more need receipts
  – don’t need a receipt only if LESS than $25
Travel Claims (continued)

• Fast track bridge tolls are not reimbursable (but bridge tolls are)

• Travel claim should not be approved by a person who reports directly or indirectly to the traveler
Travel Claims (continued)

• Use professional development accounts for registration fees when applicable
  – 660009 event related to training
  – 660090 event without training
  – Travel req will have at least two expense lines

• Travel reimbursed by Chancellor’s Office
  – Check box on claim should only be checked if the Chancellor’s Office will be paying your department back for the travel
Travel Justification Form

• Needs to be completed/approved BEFORE the travel date

• Include approved requisition number on form
  – Don’t have to wait for the justification form to be approved before finalizing the on-line requisition
Travel Justification Form

• Approval says the trip is “mission critical” so budget can be spent
  ➢When trip is over - still need approval of actual claim expenses

• Procurement Office only requires the justification form for General Operating Funds (they begin with M, THS and TS)
  ➢Certain campus divisions or approvers may request justification for all funds
Your turn

• How’s the new Travel Policy working for you?
• Comments about the Travel Justification form?
• Other questions?

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