

ACADEMIC AFFAIRS Travel Authorization CHECKLIST (revised 09/25/18):

ALL TRAVEL for employees and/or students - **SUBMIT IN ORDER:**

1. [NEW Provost Transmittal Form](#) - Print on yellow paper, place on top of documents
2. [Stateside Request for Travel Approval](#) OR [CSUSM Corporation Travel Request](#) PLEASE TYPE
3. [After-the-Fact Travel Memo Template](#) for STATESIDE ONLY (print on letterhead) - Include when submitted outside normal processing time above ****rare and unusual circumstances only**** Please contact C-Corp directly to request their After-the-Fact Memo Template at corp@csusm.edu.
4. Include delegation authority if Dean is not signing - Always print names of signers.

ADD IN FOR **INTERNATIONAL TRAVEL:**

- [State Department Travel Warnings](#) - Enter country(ies) in *Learn about your destination*. Print risk level information.
- [High Hazard/War Risk list](#) - Write on the printout if country is or is not on the list, include ALL countries traveling to.
- [Safe Traveler Enrollment Program](#) (STEP) - Submit a screen shot confirming enrollment and include email confirmation.
- [Foreign Travel Insurance Request](#)
 - Unit MPP is Emergency Contact, use 'On File' for phone.
 - Include all lodging & flight information before submitting, TBD is not acceptable.
 - Complete all information on Question 1 of insurance, US Emergency contact information is required.
 - Dates must match on all documents.
 - If multiple destinations include itinerary with lodging information for each: [TRAVEL ITINERARY TEMPLATE](#)
 - Must complete "Additional security measures being taken" on page 3 of insurance request.
 - All dates, destinations, and warnings must be included and match on all forms submitted, including personal travel connected to business travel.
 - [CSU International Travel & Requirement to Purchase Insurance Memo](#) (FYI only)

5. Backup documentation to support estimates including:

- Event information - **please spell out name of conference.**
- If mileage or auto rental estimated, **include Defensive Driving expiration.**
- Airfare or other transportation.
- Hotel quotes - [Lodging Cost Exception Approval](#) form if lodging over \$275 per night (**please note nightly cost**).
- Confirm meal estimate on authorization is max **\$55 per day** or include [International Per Diem](#) print out.
- Domestic travel - check [CSU Banned travel states](#) and the exceptions allowed for traveling to those states.

ADD IN for **STUDENT ONLY:**

- [Provost Student Air-Ground Travel Authorization](#) - Copy to student and include in packet.
- [Release of Liability](#) - Must include emergency contact & phone
- [Student Conduct Agreement](#) - Must include Faculty/Staff supervisor signature and printed name.
 - [Executive Order 1041 - Student Travel Policies](#) (FYI Only)
- Please include the travel request on all student travel.

SIGNATURE ROUTING:

Stateside & Foundation

SMFND/Fund 96xxx (Use Stateside form)

1. **Signature of Traveler**
2. **Funding Approving Authority**
3. **Approving Authority:** must have DEAN/VP signature (of travelers college/unit) or Delegation authority attached (please print name also)
4. **Final Approving Authority:** PROVOST (for outside SoCal, over \$500 and International include Yellow Transmittal).
5. **President** (routed from Provost Office) International only

CSUSM Corp

SMURS/Fund 92xxx (Use C-Corp form) Projects include 85xxx, 86xxx, and 81xxx

1. **Signature of Traveler**
2. **Funding Approving Authority**
3. **Approving Authority:** must have DEAN/VP signature (of travelers college/unit) or Delegation authority attached (please print name also)
4. **OGSR**
5. **CSUSM Corp** (unless international, then Provost Office fir

INTERNATIONAL TRAVEL ADDITIONAL ROUTING:

- The Provost Office staff will forward the request to Risk Management requesting international travel insurance.
- Upon confirmation of insurance, Risk Management emails the staff contact, traveler, and Provost Office staff.
- When final approval signatures are in place, the Provost Office staff will notify the staff contact when the travel request package is ready to be retrieved. The approved request is to be held in the department until the travel is complete and a final reimbursement claim is submitted by the traveler.

ACADEMIC AFFAIRS TRAVEL GUIDELINES

SUBMISSION DEADLINES to the Provost Office

- **Domestic: 10 business days** prior to travel.
- **International: 30 days** prior to travel if no warnings are in place, **45 days for travel with warnings or high hazard/war risk.**

It is the responsibility of the traveler/submitter to follow the travel guidelines on the PAR (Planning & Academic Resources) WEBSITE. The University discourages incurring any travel related expenses prior to final approval of travel (this will result in no-reimbursement if the authorization request is not approved).

- All dates and destinations and warnings must be included and match on all forms submitted, including personal travel connected to business travel.
- Group Travel: Submit a group travel package that includes complete travel request packages for each traveler (each package must be able to "stand alone" in an audit.
- Units must review all documents and signatures before submitting to the Provost Office. **NOTE: If the packet is incomplete, incorrect or not in order it will be returned.**
- Split Funding: If using Stateside and C-CORP funding, you must include both forms for signatures. Also, do not split costs in categories on the forms, i.e. enter all meals or lodging on one or the other. One set of documents is all that is needed with the two travel request forms.
- Split Funding: If using Stateside and FOUNDATION funding, you must include two stateside travel request forms, one for each funding source, with the expenses from each source on its own form. Do not put all expenses on both forms. One set of documents is all that is needed with the two travel request forms.
- All students, employed or not, need a travel request form along with their additional documents below.
- Travel training is available for: [Stateside](#) and [CSUSM Corporation \(C-Corp\)](#).
- C-Corp external grant travel: Shaun Icasiano in OGSR is available to help complete travel requests and expense claims, contact him at sicasiano@csusm.edu
- Additional travel questions? Contact the Stateside traveldes@csusm.edu or C-Corp corp@csusm.edu travel desks directly. For foreign travel questions contact [Sue Belt](#) in [Integrated Risk Management](#).
- Questions about Academic Affairs guidelines? Contact Maria Rasimas, Academic Affairs Resource & Operations Analyst, at mrasmus@csusm.edu