|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | |  | | --- | |  | | Approving Authorities Checklist | |  | |

# In General

|  |  |
| --- | --- |
|  | The approving authority designated to approve travel claims ensures all expenses are reasonable in terms of price, purpose, and necessity |

# Travel Authorization

|  |  |  |
| --- | --- | --- |
|  | Conference agenda is attached | |
|  | Verify travel meets justified business need |
|  | Confirm dates |
|  | Funding Available | |
|  | Pre- Approval is required for the below expenses | |
|  | Lodging rate above $275 (excluding taxes) |
|  | Supervised group trip expenses |
|  | Exceptions to the [CSU Travel Policy](https://calstate.policystat.com/policy/6965303/latest/) |
|  | If applicable provide valid Defensive Driving certificate | |
|  | Student travel | |
|  | Confirm code of conduct |
|  | Confirm release of Liability |

# Travel Claim

|  |  |  |  |
| --- | --- | --- | --- |
|  | | Confirm no travel to banned states using state funds or state sponsored projects | |
|  | | Validate, to the extent possible, that the expenses listed were actually incurred by the employee and that appropriate supporting documentation is attached | |
|  | | Reviewing and approving the business purpose and ensuring the request is in compliance with any applicable sponsored project/grant requirements | |
|  | | Approving/denying payment of the travel claim in a timely manner | |
|  | | Denying expenses not directly related to official University business | |
|  | | Conference Agenda | |
|  | | Confirm dates and no personal expenses |
|  | | Confirm meals were not included or justification is valid |
|  | | [Receipts Required](https://calstate.policystat.com/policy/6965303/latest/#autoid-ajn9x) for all expenses $75 or more | |
|  | | [Meals](https://calstate.policystat.com/policy/6965303/latest/#autoid-7kg7a) Verify and Approve meals if reasonable (confirm daily maximum is not exceeded) | |
|  | | [Lodging](https://calstate.policystat.com/policy/6965303/latest/#autoid-7kg7a) Verify and approve itemized expensed are valid (confirm lodging maximum is not exceeded) | |