|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |

|  |
| --- |
|  |
| 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) |