

Travel Planning Checklist (Domestic)

Pre-Approval to Travel (recommended submission at least 30 days prior to travel)

- Travelers must submit a travel request and be approved through Concur prior to booking any travel arrangements (this excludes service providers, candidates, and non-employee students).
 - All *stateside* employees using *state funds* (including self-support and trust) will utilize Concur Travel Software.
 - Non-state employees (including students) will continue to use the current travel forms.
- Attach supporting documents (Conference Information, Event Information, Letter of Invitation, Email communications)
- Any other documents as required by your department
 - Any exception to the travel policy (e.g., lodging over \$333 per night) will need to be approved by your division VP. *If your division uses an exception justification form, be sure to complete and attach the form to your travel request. If not, your budget approver will need to add the division VP to the Concur approval workflow to review your justification comment required in your Concur travel request. (see the "Hotels" section for additional details)*

Registration Fee Payment Options

- Individual GET card, if assigned
- Department P-card
- Personal card (you will be reimbursed after returning from travel, and your expense report has been processed)
- Contact One-Stop Financial Services to pay the registration fee (after your travel request has been approved through Concur)

Estimated Expenses

- Location-based per diem meal expenses and incidentals, with an overnight stay.*
- When the entire length of a trip is less than 24 hours, meals and incidental expenses should not be included as an estimated expense unless the traveler is away from home overnight, as supported by a lodging receipt.*
- When itemizing expenses for your travel request, be sure to include all expected trip expenses (not just what you expect to pay out-of-pocket) in order to track the total business cost of the trip.

Air Travel Booking

- Stateside employees can book flights through Concur Travel Software, which is billed directly to the University.
- Must be Coach or Economy Class (ex. Southwest = Wanna Get Away).
- Airline upgrades (including Southwest early bird check-in) are prohibited and non-reimbursable.

One-Stop Financial Services: 323-343-5430; travel@calstatela.edu

Last Updated: 4/22/24

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- Seat upgrades are not reimbursable.
- If the Traveler is requesting One-Stop Financial Services to provide payment for airfare, contact the One-Stop Office.

Hotels

- Stateside employees can book hotels through Concur Travel Software and pay with either their personal card or individual GET card.
- Travelers may secure lodging when traveling on business more than *25 miles* (one way) from their normal work location or home, *whichever distance is shorter. Subsistence expenses for travel within 25 miles of an employee's normal work location or residence shall not be reimbursed.*
- The nightly lodging rate for domestic travel may *not* exceed \$333 per night, excluding taxes and other related charges.
- If the nightly lodging rate exceeds \$333 (excluding taxes and other related charges), you will be required to include an exception justification according to your division and department requirements.
 - Travelers who attend an approved conference where the prearranged conference group/lodging rate exceeds the \$333 per night limit may stay at the conference hotel without additional approval for the prearranged conference group rate. Documentation to substantiate the prearranged conference group/lodging rate must be provided with the Travel approval packet.

Car Rental or Private Vehicle

- Stateside employees should make car rental arrangements directly with One-Stop Financial Services.
- Travelers should rent economy or mid-size class cars unless these sizes are not adequate to meet the business purpose of the trip.
- When renting a vehicle, Travelers are expected to utilize Enterprise or National rental agencies with which the State of California has negotiated contracts that include insurance coverage.
- All Travelers must complete the Defensive Driver Training.
- The Standard Mileage rate is currently \$0.67/mile and should be claimed if driving during business hours.
 - STD 261 must be filed with the Traveler's department.
 - The Traveler's license plate number is required when requesting mileage reimbursement.

Tips & Best Practices

- Travelers should keep travel documents in one place electronically for easy access when submitting a travel request.
- Travelers should keep all travel receipts, including proof of attendance (e.g., certificate, conference badge, survey email).
- Booking upgrades (e.g., optional travel insurance) are non-reimbursable.