Travel Planning Checklist (Domestic)

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

- Traveler must submit a travel request and be approved prior to booking any travel arrangements.
- Attach supporting documents (Conference Information, Event Information, Letter of Invitation, Email communications).
- Any other documents as required by your department.

Registration Fee Payment Options

- Personal credit card
- Contact One-Stop Financial Services to pay registration fee (after your travel request has been approved)

Estimated Expenses

- Actual meal expenses, up to $55/calendar day, with overnight stay.
- The meals reimbursement cap shall not be treated as a per diem.
- Actual incidental expenses up to $7/calendar day with 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.
- 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

- Must be Coach or Economy Class (ex. Southwest = Wanna Get Away).
- Refundable airline tickets are not permitted.
- Airline upgrades (including Southwest early bird check-in) are prohibited and non-reimbursable.
- Seat upgrades are not reimbursable.
- If Traveler is requesting One-Stop Financial Services to arrange for airfare, please provide the following:
  - Name as it appears on Passport, RealID, or Government Issued ID
  - Date of Birth
  - Gender

Hotels

- 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.
☐ The nightly lodging rate for domestic travel may **not** exceed $275 per night, not including taxes and other related charges.
☐ A “Travel Expense Exception” form is required if the nightly lodging rate exceeds $275.

**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. Justification is required for non-economy or mid-size cars.
☐ 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.**
☐ Mileage rate is currently $0.655/mile and should be claimed if driving during business hours.
  ☐ **STD 261** must be filed with the Traveler’s department.
  ☐ Traveler’s license plate number is required when requesting mileage reimbursement.

**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.