

Travel Request Checklist

A **Travel Request** will be required if the traveler travels domestically and within 48 states, except for Alaska & Hawaii, for more than 24 hours. You must identify the estimated travel expenses that will be incurred throughout the trip. To ensure you comply with Travel policies, ask your budget coordinator to provide an amount that is allowed for your department to spend on your travel expenses.

Checklist

☐ **Trip destination is clearly stated**

☐ **Reviewed Header tab**

- Appropriate options were selected on the following fields:
 - Request Policy - selected *State Approve then Book*
 - Request/Trip Name - correct naming convention
 - [Month] [Year] [Destination]
 - Example: SEP 2017 San Diego, CA
 - How will you book your travel?
 - Will hotel cost exceed \$275 per night? - *Selecting Yes requires entering a comment to explain why the hotel cost exceeds \$275*
 - Trip Type
 - Start Date
 - End Date
 - Report/Trip Purpose
 - Traveler/User Type
 - Purpose
 - Main Destination City
 - State
 - Additional Cities/State or Cities/Countries Traveled To
 - Regions Traveling To
 - Does this trip contain personal travel? - *If yes, provide personal dates and location in Personal Dates and Locations box*
 - Comment - include reasons of hotel cost exceeding \$275, and personal dates and location *(if applicable)*

- Division
- Department ID
- Fund

☐ **Reviewed Segments tab**

- Estimated amount was selected appropriately
- Estimated amount is within department's budget

☐ **Reviewed Expenses tab**

- Estimated amount was selected appropriately
- Estimated amount is within department's budget

Ensure these estimated travel expenses have been added (if applicable to the traveler's trip) and reviewed:

- ☐ **Airfare/Airline Fees (Baggage, WiFi, etc.)**
- ☐ **Lodging**
- ☐ **Car Rental/Car Rental Gas**
- ☐ **Mileage**
- ☐ **Actual Per Day Meal Expense**
- ☐ **Actual Incidentals Per Day**
- ☐ **Registration Fee/Workshop**
- ☐ **Registration form must be attached (if applicable)**
- ☐ **Parking Fee, Tolls**
- ☐ **Taxi/Shuttle**

Need more help?



Contact Concur Support at concur@fullerton.edu or at 657-278-3600.