Travel Authorization form FAQ

Version: 2.2
Revision Date: April 14, 2017

Accounting and Fiscal Services is pleased to introduce the new Travel Authorization form. The new form will be used for all travel authorization requests.

Improvements include helpful pop up information that will simplify completion of forms as well as built-in links to other required forms that assist with meeting compliance requirements. These improvements will enable Accounts Payable to issue reimbursements without unnecessary delays due to missing documentation.

Questions? Contact Accounts Payable Manager Lana Lewis at x52854.

What should I do if my web browser does not display the form?

This new fillable form includes advanced functionality such as pop up information and calculation that requires extended support version of the web browser. Three options are available to obtain the form:

Option 1: You can **download the form directly to your local disk**:
- Right click on the form link;
- Click on "Save Link As…" to download form;
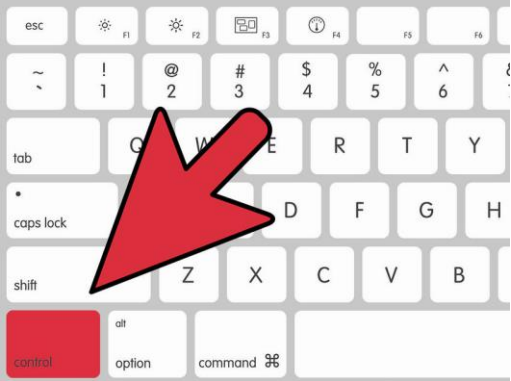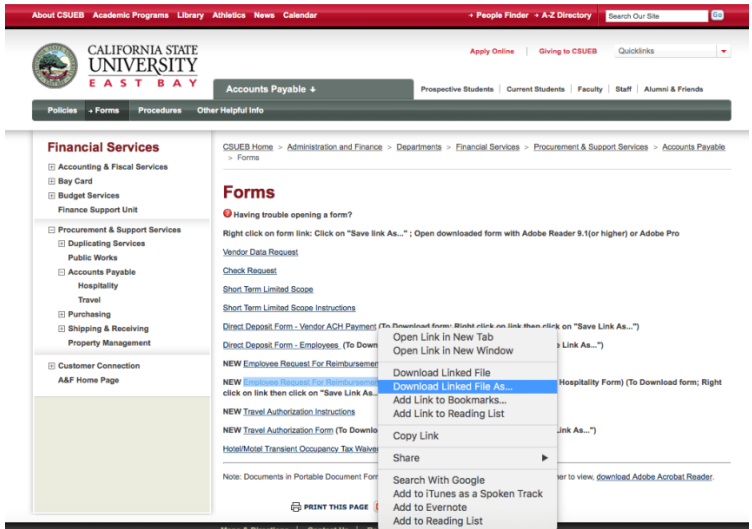- Open downloaded form with Adobe Reader 9.1 (or higher) or Adobe Acrobat Pro.
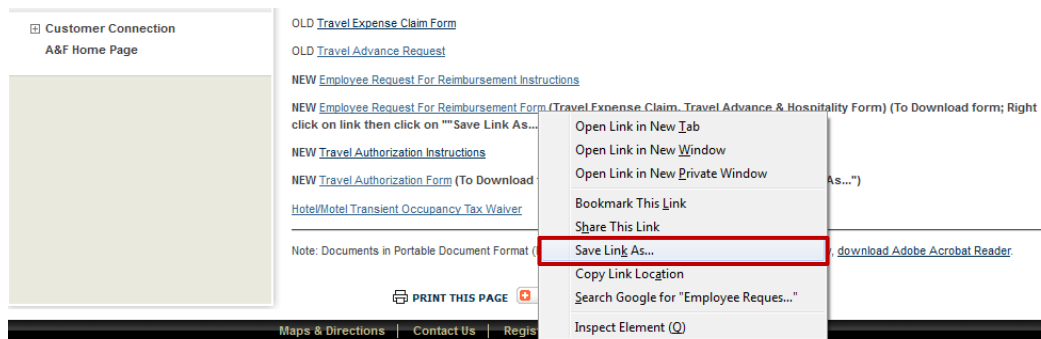
Option 2: The form is attached to this FAQ document. Click on the paperclip icon on the left-hand side of this document to view the "**Attachments**" section. Double click the attached form to open.
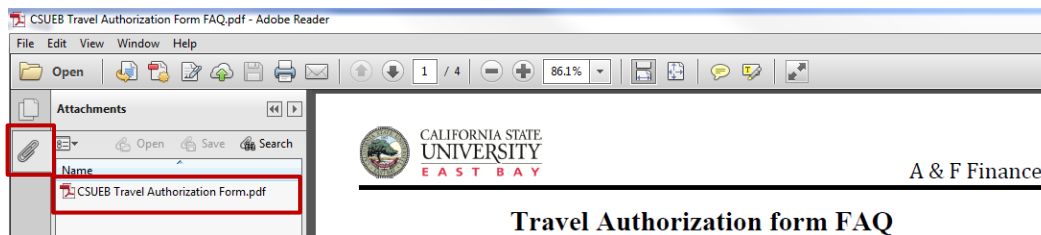
Option 3: You can contact IT help desk to install **Firefox ESR** if you wish to open and fill your form on your web browser. *Click here* for more information of the supporting web browser.

How do I download the form if I am using a Mac?

Option 1: We suggest right click on the form link to save the form, however, right-click on a Mac may not be set up on trackpad by default. There are two ways to right-click and save the form on your Mac.
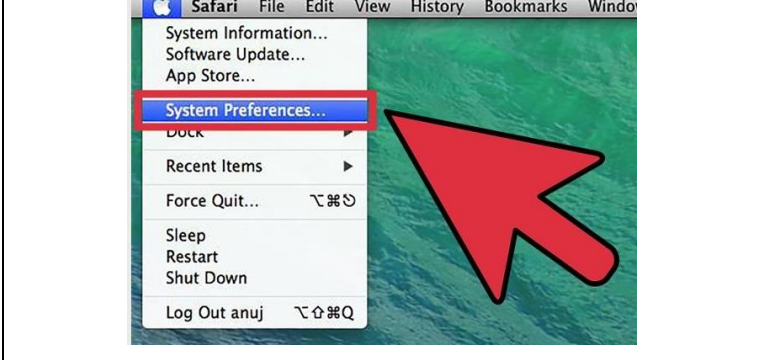
Method 1: Press the Control Key	Screenshot
Press and hold the Control (Ctrl) key while you click the mouse button	
When the right-click menu appears, select "Download the Linked File as".	

Method 2: Enable Right-Clcik	Screenshot
Click the Apple logo on the top left corner of Mac and select System Preferences	

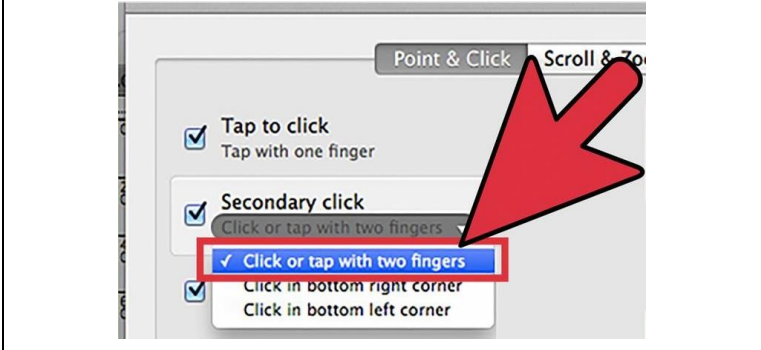| Method 2: Enable Right-Clcik (Cont.)	Screenshot
Click the Apple logo on the top left corner of Mac and select System Preferences	
Select Trackpad or Mouse depending on what you are enabling the right click for.	
Check "Secondary Click" to enable right clicking and select your preferred method of right clicking.	
After enabling the right-click, right click on the form link and select "Download the Linked File as".	
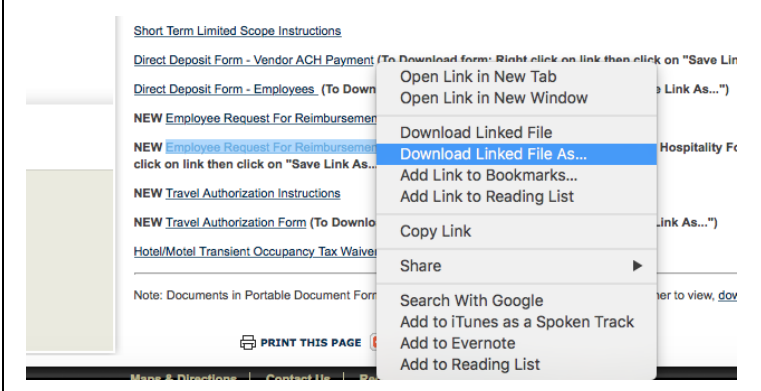
Option 2: You can also click directly into the form link and download it from the browser even the form is not displayed in your broswer. **Hover your mouse over to the bottom of the screen and a set icons will appear. Click the fourth icon and the form will be downloaded automatically to the download folder**.
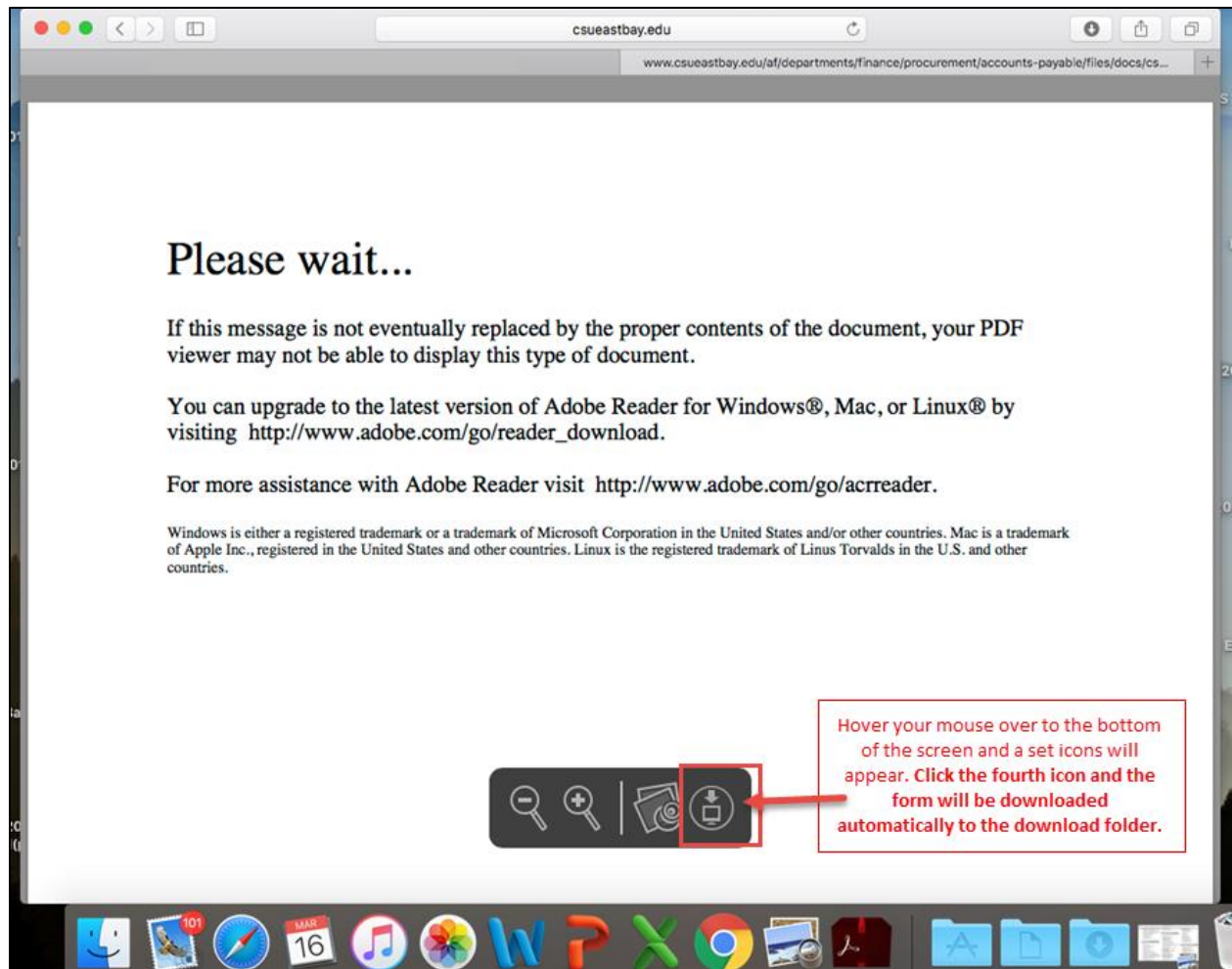
How do I view the form if I am using a Mac?

Step 1: Download **Adobe Reader for Mac** from http://www.adobe.com/go/reader_download. (Note: If you do not have administrative access to download Adobe Reader on a University Mac, please submit an IT ticket to have it installed).
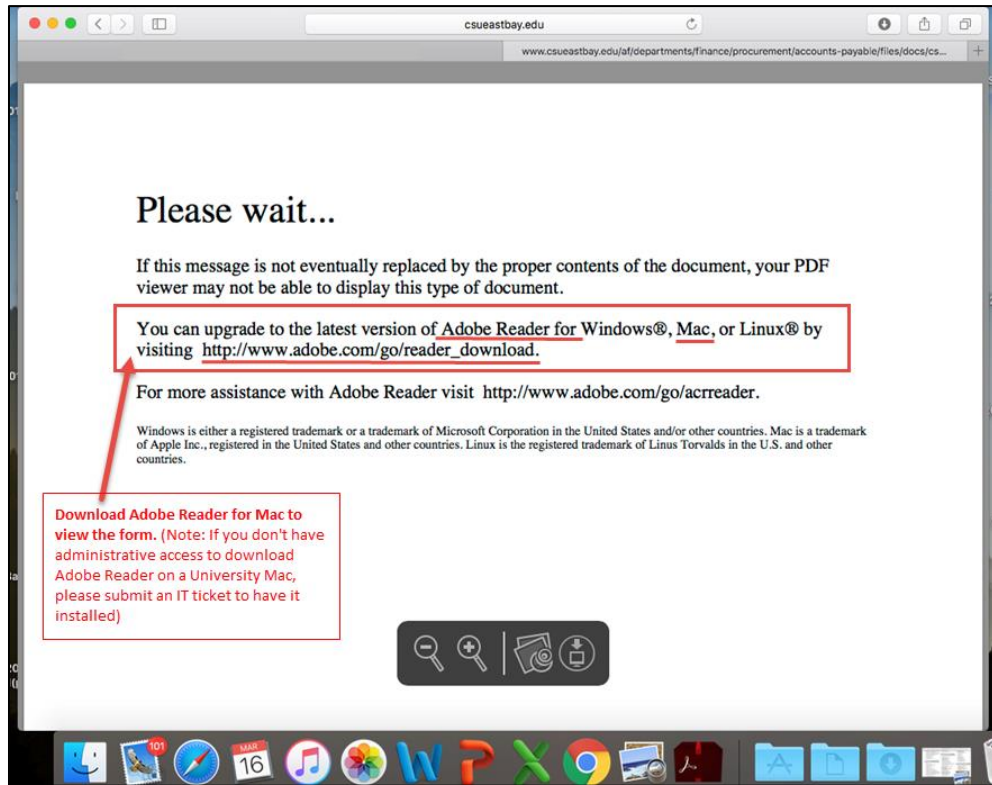

Step 2: Open the downloaded form with Adobe Reader for Mac by right clicking on the downloaded form in your download folder. (Mac by default uses "Preview" to open pdf file and Preview does not support the advanced functionality in this fillable form).
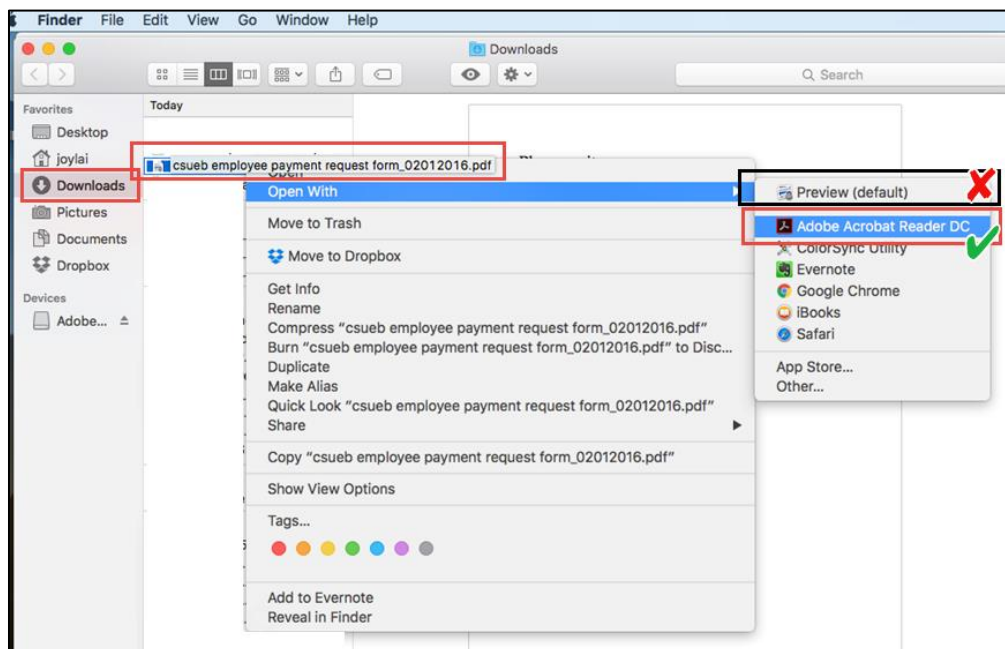
General Information Section

CALIFORNIA STATE UNIVERSITY EAST BAY

Clear Form

REQUEST FOR AUTHORIZATION TO TRAVEL

To display the authorization form, please select Item 1 - 4 (Domestic Travel) or 1 - 5 (International Travel) below:

1. Traveler Category:
☐ Faculty (Complete Class Coverage in Appendix)
☐ Staff/Administration
☐ Group Travel (Attach Release of Liability)
☐ Students (Attach Release of Liability)

2. Travel Type:
☐ Domestic Travel
☐ International Travel (Click for more information)

3. Is this an expense to be paid by Foundation ("W" Fund)?
☐ Yes ☐ No

4. Document Type:
☐ New Document
☐ Revised
☐ Cancel Travel

5. Are you traveling internationally to a High Risk Area? (If yes, Complete and Attach Chancellor Office's Approval Form)
☐ Yes ☐ No

What is the "Class Coverage" button?

When "Faculty" is selected, a "Class Coverage" section will appear in the Appendix. You can click the button to navigate to the section. Complete this section if your department requires you to do so.

What is "Release of Liability"?

When student(s) are traveling they are required to complete this form prior to traveling. This form indemnifies the University.

What travel type do I select?

If you are traveling internationally, select international travel. If not then select Domestic and #5 will not display.

Is Insurance required for International Travel?

All faculty, students and staff traveling internationally are required to use the California State University Risk Management Authority (CSURMA) Foreign Travel Insurance Program (FTIP). Insurance must be requested at least four weeks in advance of travel.

Who is required to approve International travel?

The President must approve international travel. If you are traveling to a high risk area then in addition to the President's approval the Chancellor's office must also approve your international travel. Allow at least 45 days to obtain the Chancellor's office approval.

Chartfield String Section

Chartfield String	(Go to the Travel Estimator Worksheet in the Appendix section to calculate the amounts)						
Account		Fund	DeptID	Program	Class	Project	**Amount**
660010 Insurance Expense		###	###	###	###	###	$60.00
606002 Travel-Out of State	▾	###	###	###	###	###	$1,605.00
660009 Professional Development	▾	###	###	###	###	###	$50.00
+	-				**Total** (*must match* **Total Estimated Cost** *below*):		$1,715.00
				Total Estimated Cost from the Travel Estimator Worksheet:			$1,715.00

Please note: 1) Insurance Premiums vary depending on travel categories and duration of travel. Please visit the Foreign Travel website for more information.
2) Actual insurance costs are dependent upon the duration and destination of travel. Please consider this expense in travel planning.

What is the "Travel Estimator Worksheet" button?

You can estimate your travel expenses using the "Travel Estimator Worksheet". Click the button to navigate to the estimator. The requirement to provide an estimate is department specific. The notes at the end of the form may help you complete your estimate.

How do I enter account information?

Click on dropdown menu to choose one of the common accounts or manually type the correct account if it is not listed.

Where do I obtain the correct chartfield information?

If you are unsure of the correct chartfield to use, ask your supervisor for help. Expenses will only be processed for reimbursement when they are distributed to the correct account, fund, Department, Program, Class and Project.

Signatures Section

Signatures				
By signing below, I certify that I have read and agree to follow and be bound by the **CSUEB Travel Policy**. I will complete and submit a valid travel expense claim within 30 days following the conclusion of this trip. I certify that if I am driving, I have completed and am current on my **Defensive Driving Training** certification.				
Traveler/Group Leader's Name (Print)		Signature		Date:
By signing, I certify that I have read and complied with the Approving Authority Responsibility section of the CSUEB travel policy and that the traveler/group leader has completed all forms required by the CSUEB travel policy. (Approving Authority is defined as a person to whom authority has been delegated in writing to approve expenses in accordance with University policy.)				
Approving Authority's Name (Print)		Signature		Date:
PI/Dept Approval, If Any, Name (Print)		Signature		Date:
+ − (Click to add (or subtract) lines if additional PI/Department Approval signatures are required)				
Foundation Approval's Name (Print)		Signature		Date:
Provost's Name (Print)		Signature		Date:
President's Name (Print)		Signature		Date:

Who is my approving authority?

Your approving authority is your **direct report administrator (MPP)/Chair** or higher in the absence of your direct report.

What should I do if I need more than one PI / Departmental Approval / Delegation Authority (DOA)'s signature?

Click "+" or "-" button to add or subtract rows for signatures.

Do the certifications vary upon different traveler category and travel type?

Yes. Certifications are different depending on the payment type you choose. Please read carefully before signing the form.