How to complete a Request for Authorization to Travel form (Domestic Travel)

1. Complete a Travel Authorization form

   Link to Request for Authorization to Travel form: [http://www2.humboldt.edu/forms/node/316](http://www2.humboldt.edu/forms/node/316)

   If someone else needs to be cc’d with the travel authorization number, indicate a travel arranger’s name and email address.

   ![Travel Authorization form](image)

   If a travel advance is needed, indicate travel advance amount, purpose of advance, and attach supporting documents.

   ![Travel Advance Requested](image)

   Sign/Date in the “Traveler’s Signature” section

2. Obtain approval signature(s)

   May be approved/signed by the authorized administrator responsible for the budget unit that is covering the travel expense or your immediate supervisor.

   (Note: International travel requires approval by the International Center Director and the campus President. In some cases also requires the Chancellor’s approval. To request International Travel, use the Request for International Travel form.)

3. Submit the travel authorization form to SBS 345

   Ideally, the original should be submitted to Business Services Office (SBS 345), however a copy may be emailed to [travel@humboldt.edu](mailto:travel@humboldt.edu) or faxed to 826-5703 if a travel authorization number is needed right away. (Then send the original via campus mail to SBS 345 with a note that a copy was previously submitted to avoid a duplicate travel authorization number from being issued.)
**How to complete a Request for International Travel form**

1. **Complete a Request for International Travel form**

   - Link to Request for International Travel form: [http://www2.humboldt.edu/forms/node/564](http://www2.humboldt.edu/forms/node/564)
   - If someone else needs to be cc'd with the travel authorization number, indicate a travel arranger’s name and email address.

   ![Request for International Travel form](image)

   If a travel advance is needed, indicate travel advance amount, purpose of advance, and attach supporting documents.

   ![Travel advance form](image)

   It’s recommended to register with [STEP](https://step.state.gov/step/)

2. **Obtain approval signature**

   - International travel requires approval by the International Center Director and the campus President. In some cases also requires the Chancellor’s approval.

   ![Approval signatures](image)

3. **Submit the travel authorization form to SBS 345**

   - Give a copy to Contracts & Procurement/Risk Management to process foreign travel insurance.
   - Ideally, the original should be submitted to Business Services Office (SBS 345), however a copy may be emailed to [travel@humboldt.edu](mailto:travel@humboldt.edu) or faxed to 826-5703 if a travel authorization number is needed right away. (Then send the original via campus mail to SBS 345 with a note that a copy was previously submitted to avoid a duplicate travel authorization number from being issued.)
1. Fill out Claimant’s (traveler’s) information on the top section of the form.

<table>
<thead>
<tr>
<th>Claimant’s Name</th>
<th>HSU ID</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALLY B. TRAVELER</td>
<td>01019876</td>
<td>826-3127</td>
</tr>
</tbody>
</table>

   If traveler is other than staff/faculty/admin, include the mailing address and phone number.

2. Log expenses already paid by HSU or directly billed to HSU in the “Purchased by University” section.

   If airfare was booked through CalTravelStore, be sure to include the service fee in the airfare amount. ($14 for agent assisted travel booking.)

<table>
<thead>
<tr>
<th>Purchased by University</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

   If claiming for use of personal/private vehicle, indicate vehicle license plate:

   Use this box to explain expenses and provide additional information or instructions.

3. Indicate daily expenses in the appropriate line/column.

   Note:
   - Lodging receipt needs to be itemized and shows paid in full
   - Any expense $25 and above requires an itemized original receipt
     - Meal receipt needs to be itemized and may include tip in the expense
     - If meal receipt contains alcoholic beverage, deduct the alcohol charge (and applicable taxes) from the receipt and claim the appropriate amount
     - If meal charge is included in hotel receipt, log the meal expense under the appropriate meal column
     - Put a check mark in the box next to “Meal expenses being claimed does not include alcoholic beverage(s)”
     - If there are parking charge(s) or internet charge(s) on the hotel receipt, log those expenses separately under the appropriate column.
       - Hotel internet – log it under “Other Business Expense” column
       - Parking – log it under “Taxi, Tolls, Shuttle, Parking” column
       - Room service – log it under the appropriate meal column – be sure to also include an itemized receipt for the meal and to remove any alcohol charges
     - If claiming mileage (for personal vehicle), be sure to indicate your vehicle license plate number and check box certifying you completed form STD 261.
     - Gas receipt should be for rental car only. Mileage is for use of personal vehicle.

   Use this box to explain expenses and provide additional information or instructions.
- If you received a cash advance prior to travel, indicate that amount on the bottom of the Travel Expense Claim in the “Less any cash advance provided prior to trip:” field.

<table>
<thead>
<tr>
<th>Chartfield:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Fund</td>
</tr>
<tr>
<td>Department</td>
<td>Program</td>
</tr>
<tr>
<td>Class</td>
<td></td>
</tr>
</tbody>
</table>

*If you already have a travel authorization number, expenses will be charged to the chartfield you provided on the travel authorization form.

4. If no travel authorization number or if only claiming mileage, provide the chartfield information

5. Sign the form and obtain approval signature

6. Attach receipts and send to Business Services/SBS 345

Tip:
- Since all documents are fed through a scanner, please “tape” smaller receipts to a letter-sized paper. (When taping receipts, please do not tape over printed areas since the tape may ruin the printed information.)
How to complete a Travel Expense Claim form (for International Travel)

1. Fill out Claimant’s (traveler’s) information on the top section of the form

   Link to Travel Expense Claim form: [http://www2.humboldt.edu/forms/node/90](http://www2.humboldt.edu/forms/node/90)

   ![Travel Expense Claim Form](image)

   If traveler is other than staff/faculty/admin, include the mailing address and phone number.

2. Log expenses already paid by HSU or directly billed to HSU in the “Purchased by University” section

   If airfare was booked through CalTravelStore, be sure to include the service fee in the airfare amount.

   ![Purchased by University Table](image)

3. Prep to determine reimbursable expenses in US dollar amounts

   To determine per diem rates for international travel, go to [http://www.defensetravel.dod.mil/site/perdiemCalc.cfm](http://www.defensetravel.dod.mil/site/perdiemCalc.cfm), select the country of travel and the month/year of travel:

   ![Per Diem Calculator](image)

   Note:
   - Lodging is based on the per diem amount. In the above example, you can indicate $288 at the daily lodging allowance.
   - Meals are based on the per diem amount. In the above example, you can indicate $123 as the daily meal allowance.
     - Put a check mark in the box next to “Meal expenses being claimed does not include alcoholic beverage(s)”
   - Incidents are based on the per diem amount. In the above example, you can indicate $31 as the daily incidental allowance.
   - Note: If you are in the country for half the day, use the proportional meal amount. In the above example, indicate $69 for the half day meal allowance.
   - Any other expense $25 and above requires an itemized original receipt and converted to US dollars. Use the currency converter to determine US dollar amount for the date of travel. Write the converted amount on the receipt and attach with travel expense claim. [https://www.oanda.com/currency/converter/](https://www.oanda.com/currency/converter/)
4. Indicate the expenses in the appropriate line/column

- If claiming mileage (for personal vehicle), be sure to indicate your vehicle license plate number and check the box certifying that you have completed the STD 261 form. Mileage is for use of personal vehicle.

<table>
<thead>
<tr>
<th>Purchased by University</th>
</tr>
</thead>
<tbody>
<tr>
<td>(list items already paid by HSU/directly billed to HSU (airfare, rental car, hotel, conference fee prepaid))</td>
</tr>
<tr>
<td>LOGGING</td>
</tr>
<tr>
<td>$885.95</td>
</tr>
</tbody>
</table>

| Subtotals: |
| $885.95 |

If claiming for use of personal/private vehicle, indicate vehicle license plate:

XYZ2354

5. If no travel authorization number or if only claiming mileage, provide the chartfield information

Use this box to explain expenses and provide additional information or instructions

6. Sign the form and obtain approval signature

I HEREBY CERTIFY: That (a) I received authorization to travel, (b) this travel was necessary to conduct official business, (c) expenses are true and accurate in accordance with HSU Travel Policy and procedures, (d) I will not seek reimbursement from any other source, (e) if requesting mileage reimbursement, I have satisfied the State Defense Driving Training requirements, if necessary.

Signature of Traveler: __________________________ Date: ____________

Tip:
- Since all documents are fed through a scanner, please “tape” smaller receipts to a letter-sized paper. (When taping receipts, please do not tape over printed areas since the tape may ruin the printed information.)

7. Attach receipts and send to Business Services/SBS 345

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