



CAL POLY

Strategic Business Services

ADMINISTRATION & FINANCE

Travel Request Check List

A Request should include as accurate of a trip budget as possible, therefore all expected expenses should be included. An **approved Request** will set your overall trip, so make sure to read this entire document before you start.

1. Below is a list of potential expenses to consider including in your Request for your trip:

Expense Type	Estimate...
Ground Transportation	taxi or Uber or Lyft to/from airport, hotel, meeting location, at destination, etc.
Mileage	number of miles to/from airport, hotel, meeting location, etc. <i>Note you will need to enter your personal car in your profile before you expense</i>
Airport Parking	parking cost
Car Rental	car rental cost, use Travel module to get pricing (just don't book yet)
Fuel for Car Rental	fuel cost
Airfare	car rental cost, use Travel module to get pricing (just don't book yet)
Hotel	car rental cost, use Travel module to get pricing (just don't book yet)
Meals	auto-calculated based on total number of business travel days. Add the # of Business Days in the required field to separate any personal travel days. Note, Request will give Per Diem rates. Actual expenses must be shown in Expense Report.
Hospitality	Only include if you will be hosting peers or others during your travel

2. An **approved Request** drives what you can book in Concur, therefore it is important to include all the proper expense types for your trip.
3. Travel Start Date and Travel End Date will limit your booking and expensing to that date range, so make sure to consider car rental pick up and/or drop off days when entering Travel Start and Travel End dates.

4. At a minimum, the **Request Header** and **Expenses** tabs must be filled out; use the **Segments** tab to enter Air, Hotel, and Car Rental estimates.

Request

Request/Trip Name:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name Trip Type

5. When personal travel is included in your travel date range, you must:
 - a. submit an itinerary outlining the business dates and the personal dates
 - b. only claim travel expenses related to university travel, for the benefit of doubt, these would mostly be expenses incurred on university travel dates.