Sample Travel Claim for Faculty Travel Award with Instructions

In order to prevent delays in the approval and processing of your travel award reimbursement, please follow these step-by-step guidelines on how to complete a travel claim form and what to include in your packet.

**Itemized List of Actual Expenses –**

Use the itemized list of actual expenses form to track expenses during the trip. Be sure to accurately list the date, time and location of your expense. The total will automatically be calculated.

<table>
<thead>
<tr>
<th>Travel Expenses - Itemized Listing of Actual Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traveler's Information here</strong></td>
</tr>
<tr>
<td><strong>If Department funds are being used to cover any your expenses, this section must be completed by a designated Department AOC and/or fiscal analyst.</strong></td>
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<tr>
<td><strong>If College funds are being used, this section must be completed by the designated College fund approver.</strong></td>
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<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>LOCATION</th>
<th>SUBSISTENCE</th>
<th>TRANSPORTATION</th>
<th>BUSINESS EXPENSE</th>
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<td>Meal/Hotel</td>
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*Complete the itemized list of actual expense by section: subsistence, transportation and business expense. For the travel award process, the subsistence and transportation will usually be the sections to complete.*
Travel Expense Claim –

The travel expense claim form will auto-populate based on the information entered on the itemized listing of actual expenses form.

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<thead>
<tr>
<th>LOCATION</th>
<th>TRANSPORTATION</th>
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<tbody>
<tr>
<td>Location</td>
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Verify the claimant’s (traveler’s) information is accurate.

If Department funds are being used to cover any expenses, this section must be completed by a designated Department AOC and/or fiscal analyst.

If College funds are being used, this section must be completed by the designated College fund approver.

Traveler’s original signature

Fund approver’s original signature

Contact information of individual who prepared form

Select method of check distribution
Certification of Non-Original or Electronic Receipts –

If you are unable to provide original receipts, electronic receipts are acceptable. Please complete the Certification of Non-Original or Electronic Receipts form if you will be using non-original receipts as proof of payment.

The approver, a College Dean or authorized fund approver may sign in the approver’s section.
Request for Authorization to Travel (RAT) –

The original Request for Authorization to Travel form must be attached to the travel claim packet. Please verify signature from Department Chair, College Dean, and Risk Management (international only).

- Complete the form and submit it to the appropriate administrator for approval prior to making reservations.
- If a Travel Advance is being requested, attach the completed and approved form to the travel claim upon your return. Note that all travel claims must be submitted to Accounts Payable within 60 days of the trip's end.

1. Traveler's name: __________________________ Phone No.: __________________________
2. Address: __________________________
3. Email: __________________________
4. Destination: __________________________ Mode of Travel: __________________________
5. Conference Start and End Date: __________________________ Departure Date: __________________________ Return Date: __________________________
6. Subsistence: Day(s) x $________ Per Day = Total $________
7. Registration fees: Airfare: Lodging*: Other (Specify): __________________________
8. Total estimated cost of trip (include direct billed airfare, hotel and/or vehicle): __________________________

10. I request authorization to travel as documented above. I certify that: (1) if a motor vehicle is used, I have completed a defensive driving class and, (2) if a private motor vehicle is used, I have a current Form STD 261 Authorization to Use Privately-Owned Vehicle on State Business on file. Signature of Traveler: __________________________ Date: __________________________

11. I request a Travel Advance to be used for University Business in the amount of $________ (available only for international trips). Failure to substantiate expenses and return any unused cash advance amounts, the University is obligated under IRS regulations to consider such amount as income to the employee and will be reported through pay滚滚 system as additional wages to the employee. Disposition of Travel Advance Check: Mail: _____ Pick Up: _____ Signature of Traveler: __________________________ Date: __________________________

 Dept Chair Approver: __________________________ Signature: __________________________ Date: __________________________
 Dean/Admin Approver: __________________________ Signature: __________________________ Date: __________________________

Additional Approvals for Foreign Travel Risk:

Risk Management: __________________________ Signature: __________________________ Date: __________________________
Vice President: __________________________ Signature: __________________________ Date: __________________________
President: __________________________ Signature: __________________________ Date: __________________________
Chancellor: __________________________ Signature: __________________________ Date: __________________________

*Pre-Authorization For Exception to the Travel Policy (e.g. hotel rate) please use the attached form. **

For international travel only: Risk Management approval must be completed in this section BEFORE your departure.

Any travel taking place without RM approval is unauthorized and ineligible for reimbursement. Please allow enough processing time for RM to approve your travel.

Domestic travel does not require risk management approval.
Faculty Travel Award Application

Attach a copy of the faculty travel award application.
Faculty Travel Award E-mail Notification

Attach a copy of the e-mail you received from Faculty Affairs notifying you of your award.

Dear [Name],

Congratulations! You have been awarded a Faculty Travel Award in the amount of $1,000.00 for airfare and/or lodging to be used to purchase coach airfare and/or the most economical lodging to help defray the cost of airfare and/or lodging for your presentation at the [Conference Name] from [Dates].

Reimbursement will be approved only for the cost of the actual airfare ticket and actual lodging cost. If the actual ticket and lodging amounts are less than the amount approved on the application, the difference cannot be used for other meetings or travel-related costs. The Office of Faculty Affairs and Professional Development is charged with the management of these funds. Associate Dean of Faculty Affairs & Professional Development Sophie Clavier manages the award decisions.

Reimbursement requests older than 90 days from the last date of travel will not be paid. For more information on processing a travel expense claim and reimbursement please visit: [https://sites.ucsf.edu/sites/sites7.ucsf.edu_facaffairs/files/FTA reimb_SP16.pdf](https://sites.ucsf.edu/sites/sites7.ucsf.edu_facaffairs/files/FTA reimb_SP16.pdf)

Reimbursement Checklist:
- [ ] Travel Expense Claim Form and Travel Expenses-Itemized Listing of Actual Expenses Form
- [ ] Conference/meeting agenda, program, or published dates of conference
- [ ] Original Passenger Receipt; if a copy is submitted it should be stamped and signed by approver
- [ ] Original Lodging Receipt; if a copy is submitted it should be stamped and signed by approver
- [ ] Proof of Payment: Receipts that include last four digits of credit card and last name; or a copy of your credit card statement showing proof of payment that includes your name and at least the last four digits of account number (If your statement does not show your name, please provide a front and back copy of credit card)
- [ ] Approved Request for Authorization to Travel/Travel Advance Form
- [ ] Hard-copy of e-mail from Faculty Affairs notifying you of your award

Consult with your college travel coordinator [Name] (cc'd in this email) regarding claim preparation and submission procedures. Submit all materials requested in person to your college office travel coordinator. Failure to do so will result in a delay in processing your reimbursement. The college office will forward the claim to Faculty Affairs. Faculty Affairs will review and authorize the claim and forward to Accounts Payable.

Sincerely,

[Name]
Office of Faculty Affairs & Professional Development
San Francisco State University
1600 Holloway Ave, ADM 451 | San Francisco, CA 94132
Abstract

Attach a copy of the abstract for your creative work/paper.

TITLE OF WORK

Abstract

The abstract is the second section of your paper. To arrive at a new page, insert page break after completing the title page. Type the word Abstract, should be typed in Times New Roman, 12 point font and centered at the top of the page. The title of your paper should appear as a heading in all caps on the second and subsequent pages; the words, Running head should appear only on the title page, and page numbers should be added to the heading to appear on the top right side of each page. When formatting the heading, click on the box that indicates a different first page, as only the first page has the words, Running head: with your title, without the page number, and the remaining pages have just the title (in caps) and the page numbers. The abstract should be a brief (150-250 word) summary of your paper in a single paragraph, double-spaced. Although the first line of each paragraph in the body of your paper will be indented, the first line of the abstract is not indented. You may want to add keywords to your abstract. To do this, indent as you would if starting a new paragraph, enter the word Keywords: then list your key words.

Keywords: APA format, headings, style
Agenda and/or Program

Attach a copy of the conference agenda or program

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**SAMPLE AGENDA**

Name of club and venue of meeting

One of the most important aspects of running a meeting is keeping it on track – hence a regulated and formatted approach to meetings is paramount. The following information is a suggested format to be applied to your meetings.

**Heading:**

Meeting of management Committee

Date of meeting

**Agenda Items:**

<table>
<thead>
<tr>
<th>Attendance</th>
<th>President (name)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Secretary (name)</td>
</tr>
<tr>
<td></td>
<td>Treasurer (name)</td>
</tr>
</tbody>
</table>

Members of committee

Apologies

Minutes of the previous meeting

Moved that the minutes of the meeting held (date) be confirmed as a correct record.

Matters arising from the minutes

E.g. Tasks that should have been completed

Correspondence

Inwards/outwards

Reports

E.g. Finance, facilities, volunteer co-coordinator

Motions of which notice has been given

E.g. “that the new club house should be built”

General business

E.g. Issues of concern to members

Next meeting

Date, time and venue for the next meeting

Closure

There being no further business, the Chairperson / President thanks the members for attending and closes the meeting at (time):
Receipts and Bank Statements

Attach the following documents to your travel claim:

- **Airfare**
  - Original Passenger Receipt; if a copy or e-mail receipt/confirmation is submitted, it should be stamped and signed by an approver along with a [Certification of Non-Original or Electronic Receipts](#).
  - Bank statement indicating airfare expense
  - If your bank statement does not show your name, please provide a front and back copy of the credit/debit card used to purchase your airfare

- **Lodging**
  - Original lodging receipt; if a copy or e-mail receipt/confirmation is submitted, it should be stamped and signed by an approver along with a [Certification of Non-Original or Electronic Receipts](#).
  - Bank statement indicating lodging expense
  - If your bank statement does not show your name, please provide a front and back copy of the credit/debit card used to purchase your airfare