# Travel Authorization / Intent to Travel Request

## **Reference Guide**

Read the procedure details on the first page and use the links to access procedures and policies.



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# Travel Authorization / Intent to Travel Request

Read the procedure details on page 1 and any referenced procedures and policies.

#### **PROCEDURE**

Travel is a two-step process. The first step is to obtain authorization to travel prior to making travel arrangements. The second step is an Expense Claim after the travel has occurred.

This form is the first step, the Travel Authorization / Intent to Travel. Do NOT incur any travel expenses at this point. You must receive approval to travel before you may incur ANY expenses.

If you receive approval to travel, the next step is to incur travel expenses and use the Travel Expense Claim to track these expenses. The Travel Expense Claim will not be submitted until after the travel has occurred. As you incur travel expenses (airfare, registration, etc.), you must have the Division Chair/Department Head approve these expenses. If you need a travel advance for per diem and/or need a check for travel expenses, please complete the Travel Advance section.

## Traveler/Supervisor:

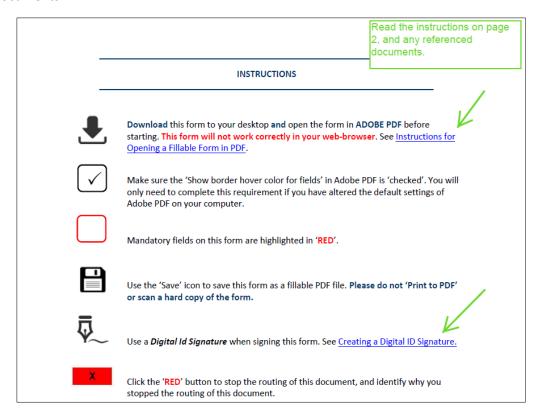
By submitting this form, I agree that I have reviewed the travel procedures at <a href="https://www.lcsc.edu/controllers-office/travel/">https://www.lcsc.edu/controllers-office/travel/</a> and

the Travel Policy 4.101 at https://www.lcsc.edu/policies.

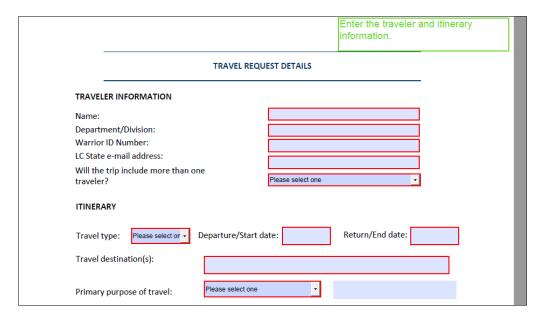
# Traveler:

I understand that it is my responsibility to review allowable expenses and obtain approval prior to
incurring a travel expense. Travel receipts are required for all expenses, except where noted. If

• Read the instructions on the 2<sup>nd</sup> page and use the links to access additional reference documents.



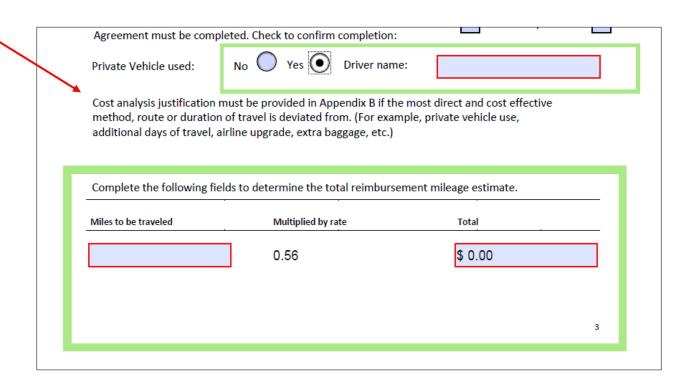
• Enter all traveler and itinerary information.



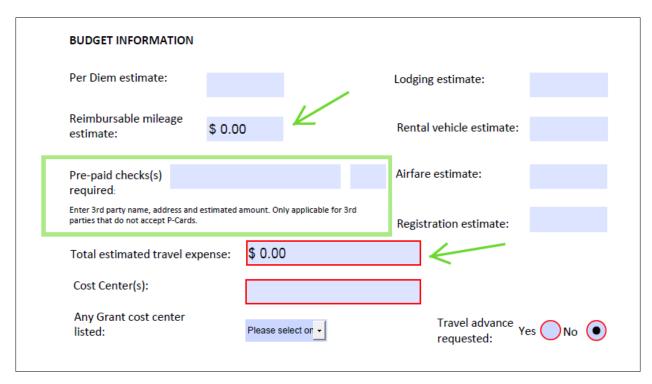
• If College owned or College leased vehicle is selected in the Primary mode of transportation drop down list, both the Traveler and Supervisor must select their respective checkboxes to confirm the traveler has completed the Vehicle Use Agreement.

Primary mode of transportation:	Please select one	
If traveling in a College owned or l Agreement must be completed. C	Supervisor.	
Private Vehicle used: No	Yes Driver name:	

- If **Private vehicle** is selected in **the Primary mode of transportation** drop down list, select the **Private Vehicle Used Yes** radio button, and the **Driver name** and mileage reimbursement estimate fields wil appear. Complete these fields.
- Pay close attention to the cost analysis requirement.



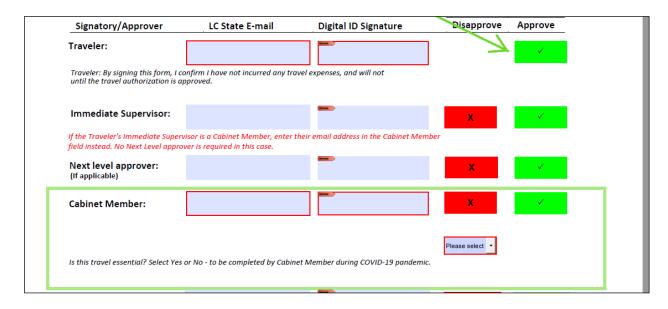
- Enter estimated dollar amounts in the **Per Diem, Lodging, Rental vehicle, Airfare**, and **Registration estimate** fields. The **Reimbursable mileage** field will auto-populate with the total from the previous page. The **Total estimate travel expense** field will auto-populate with a total of all of the estimate fields in the Budget Information section.
- Pre-paid checks **Example**: check for pre-paid conference fee.
- Pay close attention to the **Grant cost center** field and select Yes or No. Grant Approval fields on the following page will only display if the **Grant cost center** field is selected as **Yes**.
- If a travel advance is requested, select the **Yes** radio button in the **Travel advance requested** field.



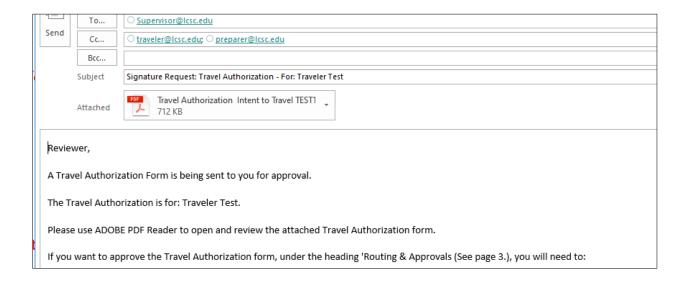
• The preparer of the form, who may be the same person as the traveler, must enter their name, email address and phone number at the beginning of the Routing & Approvals section.

ROUTING & APPR	OVALS					
Preparer of form: The do not 'Print to PDF'		•	, .	eeded e-mail a	addresses. Pl	ease
Preparer name:		Email:				
Phone #:						

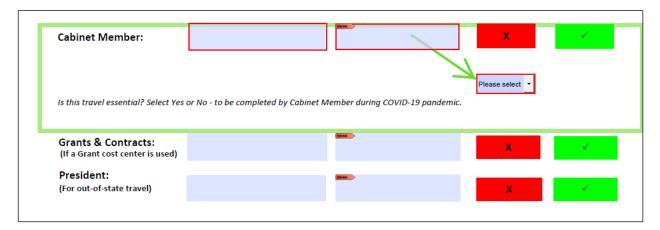
- The preparer of the form is also responsible for entering the email addresses of the traveler and other approvers.
  - The traveler's immediate supervisor should be entered into the Immediate Supervisor field. Please note, if the immediate supervisor is a Cabinet Member, enter their email address in the Cabinet Member field instead. See <u>Cabinet - Office of the President |</u> Lewis-Clark State (Icsc.edu).
  - The **Next Level approver** field will only be used in the scenario where the traveler has an approver between their immediate supervisor and Cabinet Member.
  - Once the preparer has entered all of the email addresses and sent the form to the traveler (if necessary), the traveler will begin the signature and routing process.
- Traveler will sign the form with their Digital ID. See <u>Creating a digital ID signature</u> for information on digital signatures.
- Once the traveler has signed the form, click the green **Approve** button to start the approval routing.



An auto-generated email will open after the traveler has clicked the Approve button. Simply
click the Send button on the email to start the routing. The traveler and preparer are cc'd on
the email as it is routed for approval.



• Cabinet Member must select Yes or No in the "Is this travel essential?" section



- The Grants & Contracts signature fields will only become visible if Yes is selected in the Grant
  Cost Center field above. These fields are only applicable if a grant cost center will be paying for
  all or part of the travel expenses.
- The **President (for out-of-state travel)** signature fields will only become visible if **out-of-state** is selected in the **Travel Type** field on page 3.

Once all of the approvers have approved the Travel Authorization and the Controller's Office has
accepted the approved form, the traveler and preparer will receive a message indicating
acceptance.

