

Streamlined Travel Request and Claim Processing Flow

Effective January 1, 2023 (for all Travel Requests initiated on or after this date)

All travelers submit Travel Request on **Concur** with the exception of CSUF Students and Single Auxiliary Funded travel (ASC, CSFPF). Both completes the CSUF Business Travel and Prepayment Request form.

Traveler or preparer submits a copy of the approved **Concur** Travel Request with required documentation for approval to the appropriate Auxiliary for **Split Funding**. Submit Approved Paper Travel Request (CSUF Students) with required documentation to Travel Operations or to the appropriate Auxiliary (single funded)

Travel Operations (paper request) or Auxiliary verifies Travel Request for completeness, accuracy and, original signatures (Traveler & Final Approver).

Single Auxiliary Funded (e.g. ASC or CSFPF)	CSUF State Funded	Multiple Source Funded (CSUF State Funded and Auxiliary Funded)
<p>ONLY ASC funded: Submit Travel Request to ASC (ASC Building, Attention: AP)</p> <p>Auxiliary assigns travel number TAAXXX, encumbers the funds, and emails Traveler and Preparer that travel has been approved</p> <p>Traveler submits CSUF Travel Expense Claim and required receipts to ASC (Check Request not required)</p>	<p>CSUF State and IRA Funded: Submit Travel Request on Concur or Travel Request form to Travel Operations for CSUF Students Travel</p>	<p>State & ASC funded or CSFPF funded: Submit Travel Request on Concur. Enter all expense type and account 660899 - AUX ORG Split Funding. Enter the amount and in the comment section provide the Auxiliary account number. (forward a copy of the approved request to the appropriate Auxiliary for approval)</p>
<p>ONLY CSFPF funded: Submit Travel Request to CSFPF (CP-850-10)</p> <p>Auxiliary assigns travel number TAPXXX, encumbers the funds, and emails Traveler and Preparer that travel has been approved</p> <p>Traveler submits CSUF Travel Expense Claim and required receipts to CSFPF (Check Request not required)</p>	<p>Travel Operations emails Traveler and Preparer that travel has been approved and the assigned document number</p>	<p>Submit Paper Travel Request for CSUF Students Travel. Travel Operations - Scans and emails copy of Travel Request to Auxiliary Contact</p> <p>Auxiliary - Encumbers the funds, scans, and emails copy of approved TR to Travel Operations (Paper) and department for Concur approvals Travel Operations - Emails Traveler, Preparer, and Auxiliary Contact(s) that travel has been approved and TR Number has been assigned</p>
<p>When documentation completeness, accuracy and approvals are confirmed, Traveler is reimbursed by Auxiliary and Travel Record is closed</p>	<p>Concur will auto assign the Travel Request number and notify the Traveler when the status is Approved</p>	<p>Traveler submits Concur Travel Expense Report, required receipts / documentation and upload Travel Request approved by Auxiliary</p>
<p>Questions: Contact the appropriate Auxiliary</p>	<p>\$0 Travel Request: Submit \$0 Travel Request to Travel Operations for CSUF Students</p>	<p>For CSUF Students, submit Paper Travel Expense Claim to Travel Operations</p>
<p>Revised Travel Request Single Source Funded: Submit Revised TR and copy of the original TR to Auxiliary</p>	<p>Travel Operations emails Traveler and Preparer that travel has been approved No TR number assigned</p>	<p>When documentation completeness and accuracy are confirmed, Traveler is reimbursed by CSUF</p> <p>Accounting receives copy of paid claim & submits invoice (noting chartfield and TR#) to appropriate Auxiliary and TR Record is closed The respective Auxiliary (ASC or CSFPF) uses Invoice as backup to charge the appropriate Auxiliary/Project Account</p>
	<p>Submit \$0 Travel Request on Concur for employees. Travel request number will be auto assigned</p>	<p>Multiple Auxiliary Funded (no State funds) Submit Travel Request to one Auxiliary who will coordinate it with the other Auxiliary</p> <p>Submit Travel Expense Claim and required receipts to the appropriate Auxiliary</p>
	<p>Traveler submits Travel Expense Report on Concur or Travel Expense Claim (Paper/for Students) and required receipts and documentation</p>	
	<p>When documentation, completeness and accuracy are confirmed, Traveler is reimbursed and Travel Record is closed.</p> <p>For Concur Traveler will need to Close their Travel Request when Expense Reports have been approved for payment</p>	