6.6 Travel Checklist

☐ Traveler submits Travel Request Form to administrative assistant.[1]

☐ Administrative assistant reviews request for funding approval and assigns TA number from TA log.

☐ Administrative assistant types the Travel Authority into the form and gives it to the director to sign.

☐ Administrative assistant will submit conference registration, authorize and arrange airfare, and/or create and authorize motor pool, charter bus, or rental car reservations per information on the Travel Request Form.

☐ If the CTA was used, administrative assistant logs the purchase in the FY17 Travel Log.

☐ Administrative assistant emails the traveler with the TA number and any booking confirmations.

☐ Administrative assistant attaches booking confirmations and files the TA in the pink folder.

☐ Traveler submits a Travel Expense Worksheet to office assistant by the 5th day of the month following completed travel (e.g. travel period April 6-10, the TEV is due by May 5).

☐ Administrative assistant reviews the submission and ensures all proper receipts have been submitted and information is complete.

☐ Administrative assistant enters the information into the TEV form online within one business day and electronically routes it to the traveler to approve through the electronic forms system.

☐ Traveler electronically signs the TEV and returns it electronically.

☐ Administrative assistant routes the form to the director to sign electronically.

☐ The director signs the form and routes it back to the administrative assistant for final budget approval.

☐ TEV is submitted to WSU Travel Services (typical processing time is 7-10 days).

---

[1] Travel request forms must be submitted no later than 3 weeks prior to your trip—and as early as 6 months prior to your trip— depending upon extent of logistics to be coordinated. Please refer to SDCPPM 6.5 for full Travel Guide, including required steps for authorizations, reservations, and reimbursements.