

Adobe Sign

Travel Request & Travel Claim

Who should use this process?

The Adobe Sign Travel process is for auxiliary employees, students, candidates, stateside employees using auxiliary funds, or stateside employees using split funding between state and an auxiliary.

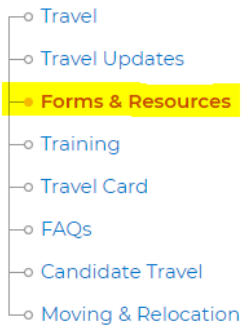
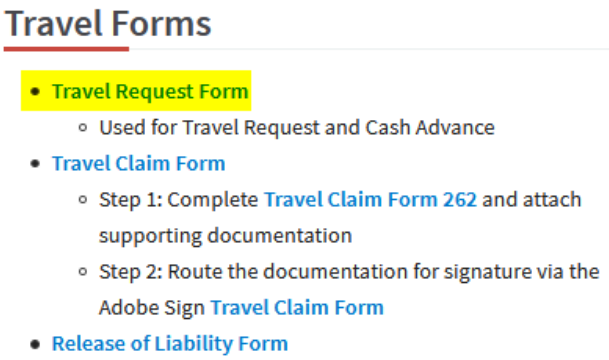
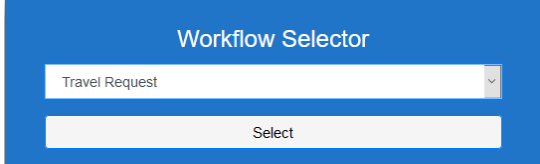
If you are a stateside employee using state funds (including trust and self-support) **please use Concur Travel Software.**

Before Starting Travel Request

A Travel Request provides authorization for an individual to travel and confirmation that funds are available.

- Only one Travel Request is submitted per travel event, including travel using split funding between two or more departments/funding sources (Corp/State/Foundation/etc.)
- Gather all appropriate information needed to complete the Travel Request including conference agenda with dates of travel, delegation of authority email (if applicable), cost estimates*, and funding information
 - A Delegation of Authority email must be included if an approver delegated signing authority on the date the Travel Request was submitted
 - **Please note: Copies of cost estimates should not be included in the request as backup. The preparer should only use them as a reference to fill out the Travel Request form. Exception: If lodging is estimated to exceed \$275 per night (excluding taxes and fees) a copy of the lodging estimate will need to be included, along with a valid business reason*
 - Chartfield string numbers from all sources funding the travel
 - Names and emails of (all) Funding Authority(ies)
- All supporting documents must be combined into one PDF or word document to be uploaded to the Travel Request Adobe Sign

Filling out the Adobe Sign Travel Request:

<p>Go to https://www.csusm.edu/travel/index.html</p> <p>Click on Forms & Resources in the upper left corner.</p>	 <ul style="list-style-type: none">TravelTravel UpdatesForms & ResourcesTrainingTravel CardFAQsCandidate TravelMoving & Relocation
<p>Under "Travel Forms," click on Travel Request</p>	 <h3>Travel Forms</h3> <ul style="list-style-type: none">Travel Request Form<ul style="list-style-type: none">◦ Used for Travel Request and Cash AdvanceTravel Claim Form<ul style="list-style-type: none">◦ Step 1: Complete Travel Claim Form 262 and attach supporting documentation◦ Step 2: Route the documentation for signature via the Adobe Sign Travel Claim FormRelease of Liability Form
<p>Select Travel Request</p>	 <p>Workflow Selector</p> <p>Travel Request</p> <p>Select</p>

Fill out the appropriate signatures.

Each department's signatures are different. Please refer the Approvers/Required Signature Matrix on the next page and your department's custom "Travel Request Signature Flow Worksheet".

You will enter email addresses, not names of individuals.

Funding Authority 1-4: Four options are available

- These four sections correspond with the four allowable chartfield strings in the document
- Each section does not need to be filled out (*only what is required for the specific travel*)
- **"Funding Authority 1"** corresponds with the first chartfield in the document
- **"Funding Authority 2"** corresponds with the second chartfield in the document
- **"Funding Authority 3"** corresponds with the third chartfield in the document
- **"Funding Authority 4"** corresponds with the fourth chartfield in the document

Requester/Traveler - REQUIRED

Enter Recipient's Email

Traveler - Required

Enter Recipient's Email

Reviewer for One-up Manager - Optional

Enter Recipient's Email

One-up Manager - Required

Enter Recipient's Email

Funding Authority 1 - Required

Enter Recipient's Email

Funding Authority 2 (Use for Principal Investigator if applicable) - OPTIONAL

Enter Recipient's Email

Funding Authority 3 - OPTIONAL

Enter Recipient's Email

Funding Authority 4 - OPTIONAL

Enter Recipient's Email

If Sponsored Project (Fund 85xxx) - Enter Sponsored Project Analysts email - OPTIONAL

Enter Recipient's Email

Reviewer for Division PAT Member - OPTIONAL

Enter Recipient's Email

Division PAT Member for Lodging Exception Request

Enter Recipient's Email

International Travel Only: President or designee (Vivigarcia@csusm.edu)

Enter Recipient's Email

International Travel Only: Risk Management (risk@csusm.edu)

Enter Recipient's Email

Approvers/Required Signatures Matrix

Step-by-step reference guide for Adobe Sign workflow

Type of Travel	Travel Request	Travel Claim
Domestic Travel in Adobe Sign	<ol style="list-style-type: none"> 1) Traveler 2) One-up Manager 3) Funding Authority (PI for 85xxx projects) 4) Office of Sponsored Projects (for 85xxx projects only) 	<ol style="list-style-type: none"> 1) Traveler 2) Travel Office Pre-Check 3) One-up Manager 4) Funding Authority (PI for 85xxx projects) 5) Office of Sponsored Projects (for 85xxx projects only) 6) Travel Office Audit and Payment
International Travel in Adobe Sign	<ol style="list-style-type: none"> 1) Traveler 2) One-up Manager 3) Funding Authority (PI for 85xxx projects) 4) Office of Sponsored Projects (for 85xxx projects only) 5) Division PAT Member or designee 6) President or designee 	<ol style="list-style-type: none"> 1) Traveler 2) Travel Office Pre-Check 3) One-up Manager 4) Funding Authority (PI for 85xxx projects) 5) Office of Sponsored Projects (for 85xxx projects only) 6) Travel Office Audit and Payment

Document Name: Add the traveler’s name, specific trip, month and year of travel.

(e.g.) Travel Request - Shannon Honour NCCI July 2020

- Shannon Honour is the name of the traveler
- NCCI is the acronym of the conference
- July 2020 is the month and year the travel will take place

Message: Add a brief description of the travel

(e.g.) Shannon Honour will be traveling to the Network for Change and Continuous Innovation (NCCI) in Atlanta, GA from 7/8/2020-7/10/2020.

Click [Submit](#).

Document Name

Travel Request

Set Reminder

Messages

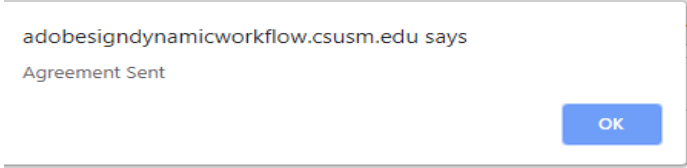
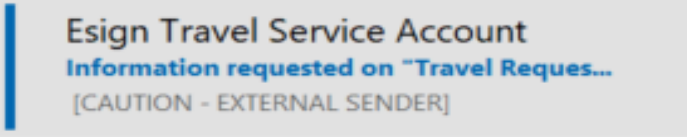
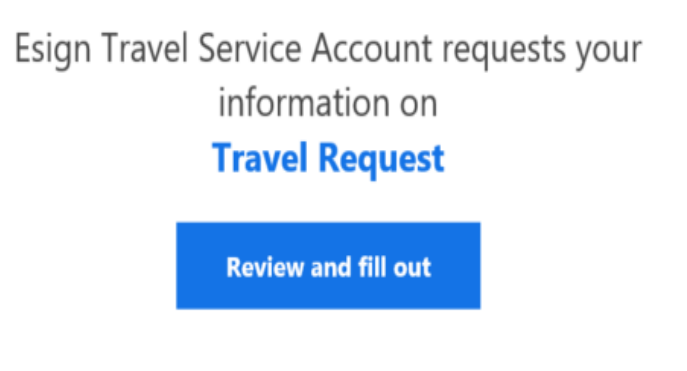
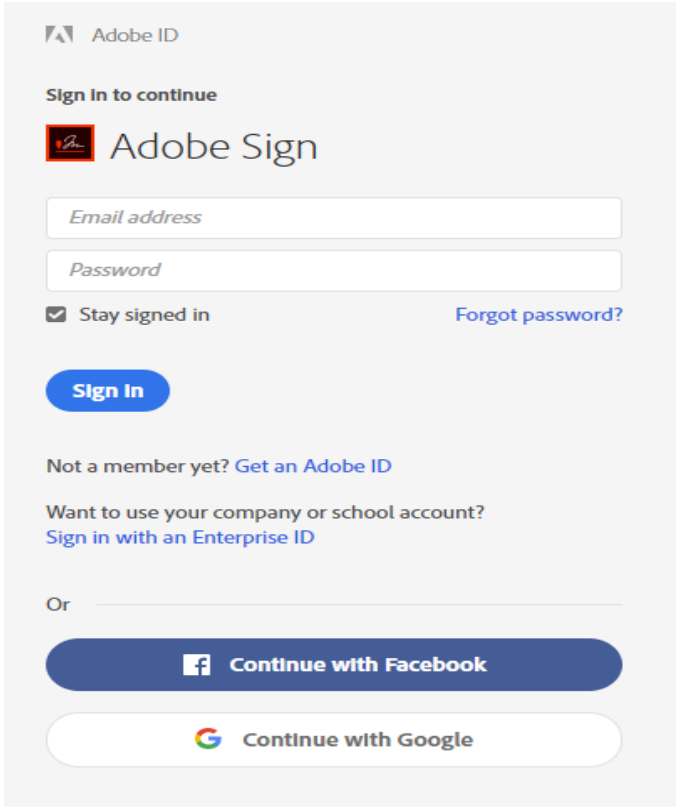

Please Sign.

Files

Document

FAS-VPFAS-Travel_Request

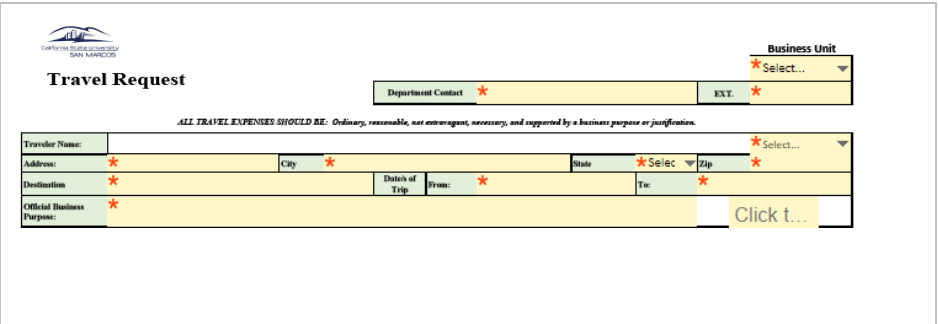
Submit

<p>After you click Submit, you will see this screen.</p> <p>Login to your Outlook email account.</p>	
<p>The email link to the form will look like this in your inbox.</p>	
<p>Click on Review and fill out.</p>	
<p>Enter your email address in this screen. You should only need to enter your email address, nothing else.</p> <p>You will then be directed to the form.</p>	
<p>Over to the top right, you will see "Next Required Field #".</p> <p>This number indicates how many required fields you need to complete before you can submit the form.</p>	



Note: Traveler name and email does not appear on the form at this stage. It will appear when the traveler signs the form.

The fields with  are required.

On the right side of the "Official Business Purpose" box, there is an upload button to attach backup documentation.



Fill in all estimated expenses for the trip.

Travel Dates	Description	MEALS**	LODGING	REIMBURSEMENT OTHER	AUTO RENTAL	MILEAGE	FUEL/FARE	NEC	UNUSUAL TAXI**	REGISTRATION**	PARADES	TOTAL
		USD	USD	USD	USD	USD	\$0.00	USD	USD	USD	USD	\$0.00

If you are requesting an advance, you will complete this section. Cash advances are 90% of the total of meals, shuttle/taxi, and miscellaneous expenses only.

Notes:

Cash Advance? YES NO

Estimated Total Travel Expenses: \$0.00

Prepaid Expense: USD

Amount to be Paid by Other Source: USD

Estimated Amount to be Reimbursed: \$0.00

** Advance Due - 90% of Expenses:

If your hotel room rate before taxes and fees will be \$275 or under, click "No."

If you are requesting a lodging exception preapproval, click "Yes" and fill in the appropriate information.

Lodging Exception Preapproval

Per the CSU Travel Policy, ICSUAM 8601.01, when traveling within U.S. and U.S. Possessions, lodging rates are not to exceed \$275/night before taxes and fees. If lodging is expected to exceed \$275/night before taxes, please provide an explanation for the requested exception. Division VP approval is required.

Do you expect lodging to exceed \$275/night before taxes and fees? YES NO

Expected amount for which I am requesting approval: \$ _____ /night before taxes and fees.

Please explain:

Approved Denied (max pay will be \$275/night, plus applicable fees) Division PAT Member Signature: _____

Once this form is submitted, it will be routed to the traveler, they will be able to check the box, and sign the form as the traveler.



Fill out funding information. You can include up to 4 chartfield strings.

I hereby certify that I am currently a California State University/Foundation Employee and that a.) If I am using a privately owned vehicle, I have a current "Authorization to use Privately Owned Vehicle" (from STD 381) on file with the University and I have the minimum liability insurance as required by State law and b.) I have satisfied the State Defensive Driver Training requirements. I have made arrangements for the classes meeting during my absence and/or for administrative and other duties.

***Current Defensive Driving cert required for reimbursement. Expiration Date:** _____

By signing I understand that the university assumes no financial responsibility for expenditures incurred by individuals who fail to adhere to policy.

Name of Traveler: _____ Date: _____

Account	Fund	Dept	Program	Class	Project	Amount	Name of Funding Approving Authority	Signature of Funding Approving Authority
	Select...					USD		
	Select...					USD		
	Select...					USD		
	Select...					USD		

Approvers will sign here. If an approver is not able to sign, they can delegate to someone else by clicking [Delegate](#) on the bottom of the email they receive.

APPROVING AUTHORITY or DELEGATE (please indicate if delegate, example: John Smith FOR Andrew Jones and attach Delegation Authority)

Sponsored Project Analyst	<input checked="" type="checkbox"/>	Date:	
Traveler's Manager	<input checked="" type="checkbox"/>	Date:	
Final Approving Authority (In-State and Out-of-State Travel)			
PAT Member ONLY	<input checked="" type="checkbox"/>	Date:	
Final Approving Authority (Out-Of-Country Travel)			
Principal or designee ONLY	<input checked="" type="checkbox"/>	Date:	
Dr. Ellen Neufeldt		Date:	

Once all the required fields have been filled out, the [Submit](#) button will appear. If you do not see this button, it is because a required field still needs to be filled out.

I agree to the [Terms of Use and Consumer Disclosure of this document](#)

[Submit](#)

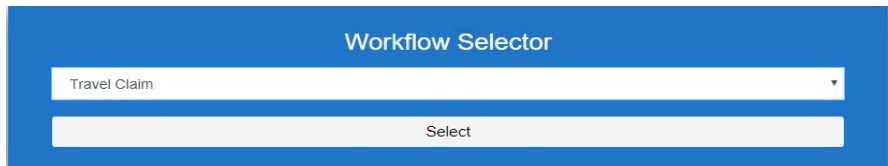
Once you click Submit, you will see this screen.

You can now close Adobe Sign.

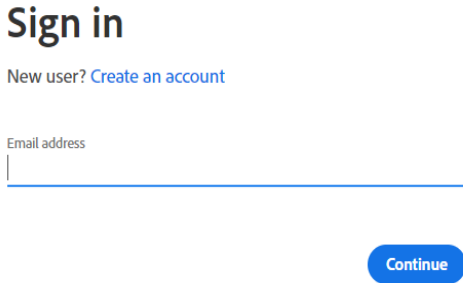
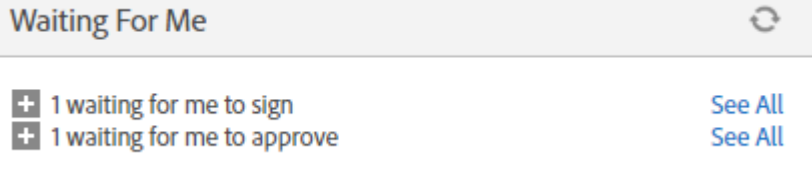


Your form will now route for signatures. If you are filling out this form as the requester and the traveler, you will get an email to sign as the traveler. You must close Adobe Sign prior to clicking on the link in the email to sign as the traveler.

Filling out the Travel Claim Signature Page in Adobe Sign:

<p>In the Workflow Selector, select Travel Claim.</p>	
<p>You will enter email addresses, <u>not</u> names of individuals.</p> <p>Please refer the Approvers/Required Signature Matrix earlier in the guide.</p> <p>Funding Approving Authority 1-4: Four options are available</p> <ul style="list-style-type: none"> • These four sections correspond with the four allowable chartfield strings in the document • Each section does not need to be filled out (<i>only what is required for the specific travel</i>) • “Funding Approving Authority 1” corresponds with the first chartfield in the document • “Funding Approving Authority 2” corresponds with the second chartfield in the document • “Funding Approving Authority 3” corresponds with the third chartfield in the document • “Funding Approving Authority 4” corresponds with the fourth chartfield in the document 	<p>Traveler</p> <p>Enter Recipient's Email</p> <p>Travel Office Pre-Check (traveloffice@csusm.edu)</p> <p>Enter Recipient's Email</p> <p>Funding Authority 1 (non-85xxx) or PI or designee (for 85xxx projects only)</p> <p>Enter Recipient's Email</p> <p>Funding Authority 2 (non-85xxx) or PI or designee (for 85xxx projects only)</p> <p>Enter Recipient's Email</p> <p>Funding Authority 3 (non-85xxx) or PI or designee (for 85xxx projects only)</p> <p>Enter Recipient's Email</p> <p>Funding Authority 4 (non-85xxx) or PI or designee (for 85xxx projects only)</p> <p>Enter Recipient's Email</p> <p>Office of Sponsored Projects (for 85xxx projects only)</p> <p>Enter Recipient's Email</p>
<p>Document Name: Add the Traveler’s Name, specific trip, month and year of travel.</p> <p>(e.g.) Travel Claim - Shannon Honour NCCI July 2020</p> <ul style="list-style-type: none"> • Shannon Honour is the name of the Traveler • NCCI is the acronym of the conference • July 2020 is the month and year the travel took place <p>Message: Add a brief description of the travel</p> <p>(e.g.) Shannon Honour traveled to the Network for Change and Continuous Innovation (NCCI) in Atlanta, GA from 7/8/2020-7/10/2020.</p>	<p>Optional – Mgr. Reviewer</p> <p>Enter Recipient's Email</p> <p>One-up Manager/Supervisor (Dean in AA)</p> <p>Enter Recipient's Email</p> <p>Document Name</p> <p>Travel Claim - [Name] <input type="button" value="Set Reminder"/></p> <p>Messages</p> <p>Please Sign.</p>
<p>Upload the completed Travel Claim Form 262 (Excel). (<i>Found under Travel Forms</i>).</p> <p>Upload the signed Travel Request if applicable.</p> <p>Click Submit.</p>	<p>Files</p> <p>Travel Claim Signature Page</p> <p>Travel Claim <input type="button" value="Please Upload A File"/> <input type="button" value="Browse"/></p> <p>Travel Request <input type="button" value="Please Upload A File"/> <input type="button" value="Browse"/></p> <p><input type="button" value="Submit"/></p>

How to check the Status of an Adobe Sign Travel Document:

<p>Go to as.csusm.edu</p> <p>Enter your email address.</p>	
<p>Under "Waiting For Me" you will see items waiting for your signature.</p>	
<p>Under "Recent Events" you can see who is next to sign documents that are being routed.</p>	