

# 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.



Controller's Office  
500 8th Avenue, Lewiston, ID 83501  
208-792-2206 | coap@lcsc.edu

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

## Travel Authorization / Intent to Travel Request

### 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 <https://www.lcsc.edu/controllers-office/travel/> 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.

Read the instructions on page 2, and any referenced documents.


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INSTRUCTIONS


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**Download** this form to your desktop **and** open the form in **ADOBE PDF** before starting. **This form will not work correctly in your web-browser.** See [Instructions for Opening a Fillable Form in PDF.](#)




Make sure the 'Show border hover color for fields' in Adobe PDF is 'checked'. You will only need to complete this requirement if you have altered the default settings of Adobe PDF on your computer.




Mandatory fields on this form are highlighted in '**RED**'.



Use the 'Save' icon to save this form as a fillable PDF file. **Please do not 'Print to PDF' or scan a hard copy of the form.**



Use a **Digital Id Signature** when signing this form. See [Creating a Digital ID Signature.](#)



Click the '**RED**' button to stop the routing of this document, and identify why you stopped the routing of this document.

- Enter all traveler and itinerary information.

Enter the traveler and itinerary information.

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TRAVEL REQUEST DETAILS

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**TRAVELER INFORMATION**

Name:

Department/Division:

Warrior ID Number:

LC State e-mail address:

Will the trip include more than one traveler?

**ITINERARY**

Travel type:  Departure/Start date:  Return/End date:

Travel destination(s):

Primary purpose of travel:

- 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:

If traveling in a College owned or leased vehicle, Vehicle Use Agreement must be completed. Check to confirm completion: Traveler:  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 will appear. Complete these fields.
- **Pay close attention to the cost analysis requirement.**

Agreement must be completed. Check to confirm completion:

Private Vehicle used: No  Yes  Driver name:

Cost analysis justification must be provided in Appendix B if the most direct and cost effective method, route or duration of travel is deviated from. (For example, private vehicle use, additional days of travel, airline upgrade, extra baggage, etc.)

Complete the following fields to determine the total reimbursement mileage estimate.

Miles to be traveled	Multiplied by rate	Total
<input type="text"/>	0.56	<input type="text" value="\$ 0.00"/>

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- 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.

**BUDGET INFORMATION**

Per Diem estimate:  Lodging estimate:

Reimbursable mileage estimate:  Rental vehicle estimate:

Pre-paid checks(s) required:

Enter 3rd party name, address and estimated amount. Only applicable for 3rd parties that do not accept P-Cards.

Airfare estimate:

Registration estimate:

Total estimated travel expense:

Cost Center(s):

Any Grant cost center listed:

Travel advance requested: Yes  No

- 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 & APPROVALS**

**Preparer of form:** The preparer of this document is responsible for identifying all needed e-mail addresses. Please do not 'Print to PDF' or send a scanned copy of this form for signature routing.


**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 [Cabinet - Office of the President | Lewis-Clark State \(lcsc.edu\)](#).
  - 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 [Creating a digital ID signature](#) for information on digital signatures.
- Once the traveler has signed the form, click the green **Approve** button to start the approval routing.

Signatory/Approver	LC State E-mail	Digital ID Signature	Disapprove	Approve
<b>Traveler:</b>	<input type="text"/>	<input type="text"/>		<input type="button" value="Approve"/>
<i>Traveler: By signing this form, I confirm I have not incurred any travel expenses, and will not until the travel authorization is approved.</i>				
<b>Immediate Supervisor:</b>	<input type="text"/>	<input type="text"/>	<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
<i>If the Traveler's Immediate Supervisor is a Cabinet Member, enter their email address in the Cabinet Member field instead. No Next Level approver is required in this case.</i>				
<b>Next level approver:</b> (If applicable)	<input type="text"/>	<input type="text"/>	<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
<b>Cabinet Member:</b>	<input type="text"/>	<input type="text"/>	<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
<input type="text" value="Please select"/>				
<i>Is this travel essential? Select Yes or No - to be completed by Cabinet Member during COVID-19 pandemic.</i>				

- 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.

Send	To...	<a href="mailto:Supervisor@lcsc.edu">Supervisor@lcsc.edu</a>
	Cc...	<a href="mailto:traveler@lcsc.edu">traveler@lcsc.edu</a> ; <a href="mailto:preparer@lcsc.edu">preparer@lcsc.edu</a>
	Bcc...	
	Subject	Signature Request: Travel Authorization - For: Traveler Test
	Attached	 Travel Authorization Intent to Travel TEST1 712 KB

Reviewer,

A Travel Authorization Form is being sent to you for approval.

The Travel Authorization is for: Traveler Test.

Please use ADOBE PDF Reader to open and review the attached Travel Authorization form.


If you want to approve the Travel Authorization form, under the heading 'Routing & Approvals (See page 3.), you will need to:

- Cabinet Member must select Yes or No in the “Is this travel essential?” section**

<b>Cabinet Member:</b>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Is this travel essential? Select Yes or No - to be completed by Cabinet Member during COVID-19 pandemic.</i>				
<b>Grants &amp; Contracts:</b> (If a Grant cost center is used)	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>President:</b> (For out-of-state travel)	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 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.

Send	To...	<a href="mailto:traveler@lcsc.edu">traveler@lcsc.edu</a> ; <a href="mailto:preparer@lcsc.edu">preparer@lcsc.edu</a>
	Cc...	<a href="mailto:Controllers Office Travel">Controllers Office Travel</a> ; <a href="mailto:Supervisor@lcsc.edu">Supervisor@lcsc.edu</a>
	Bcc...	
Subject	Accepted: Travel Authorization Form - From: Controller's Office - For: Traveler Test	
Attached	 Travel Authorization Intent to Travel TEST1 712 KB	

Traveler

A Travel Authorization Form has been accepted by the Controller's Office.

The Travel Authorization Form is for: Traveler Test.

Thank you.

COTravel@lcsc.edu