

## CHECKLIST FOR STAFF

*All travel must be approved in advance of absence from the campus. Forms are required for requests involving money and/or absences in excess of 12 hours.*

### Forms and Signatures

- “Staff Request for Support” required for *all requests involving money and/or for absences in excess of 12 hours*. Signed by supervisor and/or Section Head.
- “UCSC Travel Request & Advance Request” required for any request that involves an expense, except on-campus Training & Development classes. Employee signature only.
- Send forms to Library Financial Services (or Media Business Operations for MS units).

### Arrangements

- For travel and off-campus programs*, the employee is responsible for making travel arrangements and reservations. Employee may request an "early reimbursement", for payment to be made on his or her behalf, or a cash advance on the “TRAVEL REQUEST & ADVANCE REQUEST”. For airfare to be paid to a local travel agency (CTS Billing), actual booking of flight cannot be made until travel forms have been approved by Library Management. Please alert your service center when airfare payment to a travel agency is being requested.
- For on-campus classes*, the employee is responsible for enrolling in desired class. It is recommended that the employee call to enroll upon approval by the supervisor, although attendance is contingent upon final approval by the AUL-HR.
- Enrollment in *University Extension classes* is initiated by Library Financial Services (or Media Business Operations) upon request approval and completion of enrollment form.
- Contact Library Office (or Media Business Operations) to arrange for *University vehicles*. (If trip is cancelled, be sure to notify garage in advance to avoid charges.)

### Follow-up

- Cancellation:** If an event that has been approved is not attended, the employee should inform the Financial Services Office (or Media Business Operations) as soon as possible.
- Submit “Post Travel Expense Form” with receipts to Library Financial Services (or Media Business Operations) within 5 working days. Reimbursement, if any, can be anticipated within one week. No follow-up required for Training & Development classes.