**Instructions for seeking pre-approval for travel**

**Domestic Travel for CU Employees (Faculty, staff or students who are employed in positions like TA, RA, or student hourly) and CU non- employees (students who are not employed in positions like TA, RA, or student hourly and visitors) and International Travel for non CU Employees (students who are not employed in positions like TA, RA, or student hourly and visitors) .**

There is one step to the approval process for all travel which must be completed before booking any portion of the trip.

Step 1: Submit a Department Travel Authorization (DA) Request Form <https://csfinance.colorado.edu/travel-authorization-request-form> to receive approval for travel via the receipt of a DA number.  Once your DA request is submitted CS team will review the request and then you’ll receive an email from either CS team or Alec Lavender with your DA number and instructions on how to book travel.

* For student travelers, it’s very important that when you’re submitting the DA request form that you include your email on the form **and** the email of the faculty member or staff member who is funding/sponsoring the trip on the form, so that you **both** receive a copy of the DA and so that CS team knows that the faculty/staff member has approved of the trip. This will expedite the process; otherwise, it will cause a delay to the process.

Here's an excerpt from the DA form with instructions to follow on how to add multiple email recipients so that they all receive a copy of the form.

Email

To send a copy of this request to multiple email recipients designate by a comma. Example: first.last@colorado.edu, first.last@colorado.edu (both will receive an email copy of this request upon submission).  If you’re a student who has received permission from a faculty member to create a purchase request, create a request for reimbursement, or to request approval to travel, you MUST include in the email section of this request, the email of the faculty who has authorized the transaction, so that they receive a copy of your request form. Forms submitted without this information cannot be processed and you will be asked to re-submit your transaction.

* Extremely Important note: Due to CU Covid travel restrictions, we cannot reimburse any out-of-pocket airfare. You must book your flight through CU’s travel agency or Concur so that it’s direct billed to CU. Instructions on how to book your flight will be included in the email you receive from our team after you submit your DA form.

When you’ve received an email with your DA number/final authorization to travel from CS team or Alec Lavender it is at this time that you can book your trip.

**International Travel for CU Employees (Faculty, staff or students who are employed in positions like TA, RA, or student hourly)**

There are three steps to the approval process for all travel which must be completed before booking any portion of the trip.

Step 1: Submit a travel request for approval through concur by following these instructions.

* 1. Log into concur.  To get to Concur, log in to your [campus portal](https://my.cu.edu/).  On the CU Resources tab, select Business Tools then select Concur Travel & Expense System.
  2. Hover over the New button and select Start a Request.
  3. Complete the required fields on the Request Header tab
     1. If you anticipate traveling to more than one city and/or country, enter where you plan to spend the majority of your travel time as the Main Destination Country. You’ll identify the other cities/countries later.
     2. For international trips, if you are unsure of whether you are taking information or equipment subject to export control, select Yes so your campus’ Export Control office will be notified about your trip.
     3. Fully explain the reason for your trip in the Comments area. If grant funds are being used for the trip, also explain how this trip relates to the grant.
     4. Use Concur ([domestic travel link](https://www.cu.edu/psc/travel/booking-travel/booking-trip-through-concur), [international travel link](https://www.cu.edu/psc/concur-how-international-airfare-concur)) or [Christopherson Business Travel](https://www.cu.edu/psc/travel/booking-travel/full-service-booking-through-agent) (CBT) to obtain your desired travel itinerary and quote. You’ll need this to complete the Estimated Total Trip Amount, as well as to complete the next part of this request.  However, do NOT book the airfare until the full approval process outlined in this step by step (step 1 step 2 and step 3) are complete.
  4. Select Speedtype (Finance Fiscal Roles) – do NOT select HR Supervisor (HCM Reports to).

By selecting Speedtype (Finance Fiscal Roles) the request will be routed to the correct approver who is Chair Ken Anderson.

* 1. Click Save
  2. Select the Segments tab. Air Ticket information is required and impacts approval flow for your request. Click the plane icon and select Air Ticket.  Use the radio buttons to select whether your trip is Round Trip, One Way, or Multi Segment. If there is a layover or plane change at any part of your flight, select Multi Segment.  List the air segments of your trip so they match your preliminary trip itinerary.  If traveling by a mode of transportation other than flight, still enter the details under the Air Travel section and provide the transportation mode in the comments. Note: Car Rental and Hotel Reservation segments are optional.
  3. Review the Approval Flow tab.  Your request will first route to SpeedType approver which is Chair Ken Anderson.
  4. Click Submit Request
  5. The Final Review window opens.  To review the export control and regulatory compliance information, click the link for your campus. Click Accept & Submit.
  6. Each approver will need to approve the concur request **before** you proceed with step 3 which is to submit a Department Travel Authorization (DA) Request Form. You will be notified by email when the concur request is fully approved. Note, while the concur request is pending approval you can complete step 2.
  + If you’re booking an international trip in Concur, you’ll need to enter the approved Request ID as part of the required information.
  + If you’re booking an international trip through CBT, your agent will be able to work with you when they receive the automated email.

Step 2: If you haven’t already added the CS team members as delegates in concur, follow the instructions found at this [link](https://www.colorado.edu/cs/sites/default/files/attached-files/z._adding_delegates_step_by_steps.pdf) to add CS team members stephanie.morris@colorado.edu, tammy.lane@colorado.edu, mike.collier@colorado.edu, alec.lavender@colorado.edu and kelly.oflannigan@colorado.edu as prepare delegates to your concur profile so that we have access to create expense reports on your behalf and to monitor your concur approval request.  Assign all permissions by checking off all available selections (i.e. can prepare, can submit requests etc.).

Step 3: Submit a Department Travel Authorization (DA) Request Form <https://csfinance.colorado.edu/travel-authorization-request-form> to receive approval for travel via the receipt of a DA number.  Once your DA request is submitted CS team will review the request and will check that the concur approval is in place and then you’ll receive an email from either CS team or Alec Lavender with your DA number and instructions on how to book travel.

* For student travelers, it’s very important that when you’re submitting the DA request form that you include your email on the form **and** the email of the faculty member or staff member who is funding/sponsoring the trip on the form, so that you **both** receive a copy of the DA and so that CS team knows that the faculty/staff member has approved of the trip. This will expedite the process; otherwise, it will cause a delay to the process.

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