# SUNY Potsdam Travel Requisition Guide

Below is a preview of questions you will be asked when completing our new on-line Microsoft Form Travel Requisition.  This guide is not a required form but a resource for completing the mandatory Microsoft Form.

## THE BASICS:

Name: _____  Email: _____  Department: _____

Destination (City): _____  State: _____  Country: _____

Departure Date: _____  Departure Time (include AM/PM): _____

Return Date: _____  Return Time (include AM/PM): _____

Purpose of Travel: _____

Strategic Priorities (select all that apply):

- o  Financial Stability & Analysis
- o  Enrollment & Retention
- o  Academic Programs & Planning
- o  Diversity, Equity, Inclusion, and Belonging
- o  Connecting with the Community

Upload any documents at this point (agenda, flyers, list of travelers, etc.)

Is this travel requisition being submitted as a record of travel ONLY where no expenses will be incurred?  Y/N

- If YES... it takes you directly to APPROVALS SECTION
- If NO... it takes you to the next question

Are you ONLY requesting a state vehicle for this trip (no other expenses)?  Y/N

- If YES... it takes you directly to APPROVALS SECTION
- If NO... it takes you to the next question

## ANTICIPATED TRAVEL EXPENSES:

Will there be a registration fee?  Y/N        If yes, enter amount: _____

   *If a check is required, you must enter it in Jaggaer as a non- encumbered payment.*

Lodging Cost (# of nights x rate): _____

   *It is the traveler's responsibility to ask for the government/state rate when booking*

Is it Government Rate (per diem rate website is linked in the form)?  Y/N

- If YES.... it takes you to the Transportation Section
- If NO... it asks these questions designed to justify your over the max – you will be notified if is approved/denied:
    - Provide non-government rate/ government rate: _____
    - Hotel name and address: _____
    - Over the Max Justification: _____

Rental Car:  $_____

Personal vehicle mileage (complete/add comparison form if over 100 miles): $ _____

State Vehicle:  Y/N

Train:  $_____

Airfare:  $ _____

Departing Airport (if applicable): _____

Airfare Justification/Breakdown of Cost (if applicable): _____

Meals (enter nightly per diems AND any extra breakfast/dinners): _____

Gas/Tolls/Parking/Subway/Taxi/Uber: $ _____

Other Costs:  $_____

Total Projected Cost of Travel:  $_____

   *You will need to do the math – the Microsoft Form does not add up the costs)*

Using Tcard?  Y/N


**FUNDING SOURCE:**

Will you be using State Funds? Y/N

- If YES... enter State Funds anticipated Cost and Account Number:  _____
- If NO... form takes you to the next question

Will you be using a Foundation Fund?  Y/N

- If YES... enter Foundation Funds anticipated Cost and Fund Number: _____
- If NO... it takes you to the next question

Other Funds if applicable (grant, self-pay, etc.): _____

Comments and/or additional notes: _____


**APPROVALS:**

***Note:  You are entering their information only – we will be tagging travel liaisons, supervisors and account owners in Jaggaer for approvals.***

***For Travel Liaison, please enter the designated staff member in your area who helps you plan your  travel and/or manage your budget.***

Department Travel Liaison's name: _____

Department Travel Liaison's email: _____

Supervisor's name: _____

Supervisor's email: _____

Acknowledgement

- Check box for email receipt
- Hit submit

Hit *save response* if you choose to do that.



If you need to make a change after it is submitted, please simply email [Travel@potsdam.edu](mailto:Travel@potsdam.edu) and we will make any corrections for you.

Once the form is submitted, it will be reviewed by the Travel Team and then entered into Jaggaer for approvals.

We will notify you by e-mail if we have any questions and/or when the travel is approved.