

TRAVEL AUTHORIZATION CHECKLIST

Name of Traveler: _____

Dates of Travel: _____

Location: _____

Purpose for Travel: _____

1. Get a Travel Authorization form from the [Controller's Office website](#), or off of MyCharleston
2. To generate a TA number you must click on the button "Assign TA number"
3. Fill in all personal information and be as specific as possible about the purpose of the travel
4. Turn the TA form in either electronic or hard copy form to Lauren for accounting information with this form attached
5. Once Lauren has received the appropriate approval, she will email a signed copy of the TA to Marilyn Tharp for the Dean's signature and will cc you and your program director on the email
6. Upon return from your travel, you must complete a Travel Reimbursement form within 15 days

TRAVEL REIMBURSEMENT CHECKLIST

Name of Traveler: _____

TA number: _____

1. Get a Travel Reimbursement form from the [Controller's Office website](#), or off of MyCharleston
2. To complete the Travel Reimbursement form, enter each expense on its own line in the lower portion of the form, then align the value of the expense under the associated column (for example \$400 spent on airfare should go into Column F "Airfare").
3. Then, take the subtotal amounts from each column and place that value in the "Amount" column on the lower left hand portion of the form. You can also fill in the "Index" number by referring to your original TA and referencing the index number(s) Lauren used when completing the TA form. For "Account" you can determine which number to use by referring to the numbers in the upper portion of the Travel Reimbursement form and aligning them with the travel status which best pertains to your type of travel. For example, if you went out of state to a conference and are looking for a reimbursement of \$400 in airfare, you would use 730212.
4. When the form is completed, sign it and send Lauren a **copy** of the form **only**. Send the original, along with all related travel receipts, in an inter-campus envelope to the Controller's Office in the basement of the Lightsey Center. For foreign travel, also include an exchange rate.