

ADOBE FORM INSTRUCTIONS
AP - Travel Authorization form (SELF)

Instructions for completing the Travel Authorization form (SELF) using Adobe Sign workflow. Advance approval is required for any person traveling on University Business. This form may be used for this purpose.

- 1) From the AP Forms page, you can click on the form, and log into Adobe Sign. You will start from the Library, and click on the workflow, and select the AP - Travel Authorization form (SELF)
- 2) Next you will need to note the recipients; which would include you and your approvers
- 3) Next you will note yourself as the traveler
- 4) Then add your approver(s)
- 5) If you are using ORSP funds, you will need to add the approver for that fund
- 6) If you are traveling internationally, you will need to include the President as an approver
- 7) If traveling internationally, please be sure to cc Risk Management at RiskManagement@csueastbay.edu to be included for the international insurance
- 8) Under the Email Subject, please be sure to include your last name, first name
- 9) Next hit the send button and it will take you to the form that will need to be completed
- 10) Name of Traveler: First and Last name
- 11) NetID, Dept ID, Email, and Department Contact/Preparer, and Contact phone number
- 12) Traveler Category must be selected
- 13) Traveler Type must be selected
- 14) Destination must be noted
- 15) Travel dates (To and From) must be noted, along with any Personal travel (if applicable)
- 16) Business Purpose must be noted
- 17) Total Estimated Expenses must be noted for things such as; meals, registration, lodging, transportation, foreign insurance, and any other expenses that may be incurred on this trip

18) Note the Policy Information and Helpful links

19) Provide your chartfield information such as; Fund, DeptID, (Required) and Program, Class, and Project if applicable.

20) If driving a personal vehicle while on state business, a 261 form must be completed annually, along with taking the defensive driving course which is good for 4 years.

21) Last step would be to sign your travel authorization agreement and this will route it to the approvers and you will receive an email after everything has been signed.