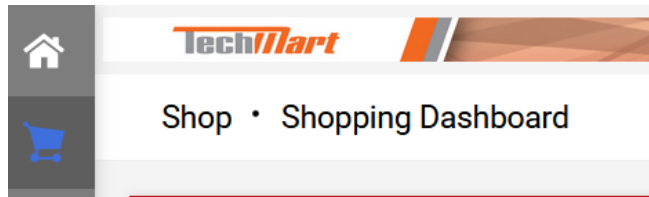


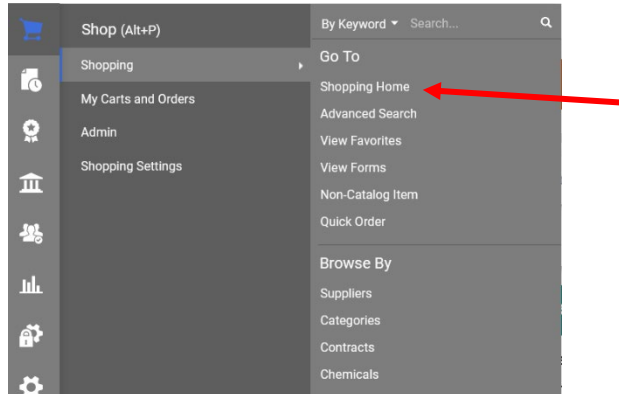
New Traveler Request Procedure

The New Traveler Request form can be found in TechMart.

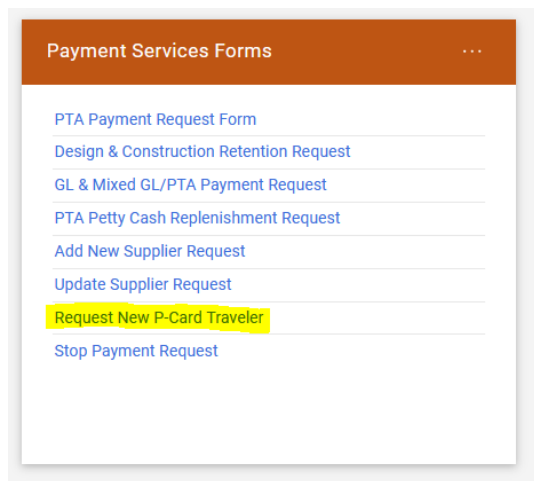
1. TechMart Shopping Cart Icon



2. Shopping Home



3. Payment Service Forms – P-Card New Travel Request



4. Click next. Proceed to answer all questions.

Request New P-Card Tra...

Request Actions | History | ?

| | |
|-------------|-----------------|
| Form Number | 7945723 |
| Purpose | Generic Request |
| Status | Incomplete |

Instructions

Caltech's Accountable Plan follows the Internal Revenue Service's (IRS) regulations for reimbursing employees for business expenses incurred while performing work for their employer. Reimbursements under the Accountable Plan are not considered income and excluded from W-2 reporting.

The Accountable Plan may be extended to non-employees under very limited conditions. Non-employees must be able to document a valid business purpose and benefit to the Institute in order to qualify for expense reimbursements under the Accountable Plan. For more information, refer to [Non-Employee Travel Policy](#).

Complete this form to add a new P-Card Traveler record in Oracle. Please identify if traveler is a Caltech individual or non-employee. Supplier Management will create a record to use in CardQuest for travel expense reports. Use the **Update Supplier Request** for changes to an existing traveler or employee record.

Provide details below to fulfill Accountable Plan requirements.

- Trip Business Purpose/Benefit to Caltech
- Description of Costs
- Travel Dates

New or updated records will interface to CardQuest in 24 hours. Please allow time for the traveler names to be available in CardQuest.

Next >

5. Submit the form.

Request New P-Card Tra...

Request Actions | History | ?

| | |
|-------------|-----------------|
| Form Number | 7945723 |
| Purpose | Generic Request |
| Status | Incomplete |

Review and Submit

Required Fields Complete

| Section | Progress |
|-----------|--------------------------|
| Details | Required Fields Complete |
| Questions | Required Fields Complete |

Discussion

Form Approvals

Previous Add to Favorites Submit

End of Activity