



Travel Request Form: Instructions

When making a travel request, please fill out the travel request form on the following page. Upon pre-approval by CFPD, the trust can cover travel expenses for the beneficiary and a travel companion.

- **Included Costs:** Costs can include transportation, lodging, food, and entertainment. Souvenirs and additional spending money may be granted but may only be used for the benefit of the beneficiary. **If the vendor allows pre-payment, CFPD will cover any expenses ahead of time (e.g. hotel reservations, excursions, airfare, etc.).**
- **2 Week Pre-Approval:** All requests must be submitted at least 2 weeks before the funds are needed. Short notice travel requests (less than 2 weeks) may not allow for all portions of the pre-approval process to be completed. All requests are reviewed on a case-by-case basis.
- **Guardian:** If the beneficiary has a guardian, CFPD will need to receive support from the guardian for the request. Once the budget and guardian recommendation are received, the case manager will submit the request for approval. If more information is required, the case manager will follow up with additional questions.
- **Travel Companion:** If the travel companion will be managing the funds for the beneficiary, the travel companion will need to complete a background check. If the companion has a completed background check (dated within one year from travel dates) on file with another agency (HHP, professional caregiver, etc.), CFPD will accept a copy in place of a new background check. It is required that all receipts be signed by the beneficiary and submitted back to the trust to account for the money spent while traveling.
- **Government Benefits** Depending on the beneficiary's government benefits, the trust cannot give money directly to the beneficiary because it will be seen as income.
- **Rental Car:** Per CFPD policy, rental car expenses cannot be placed on a CFPD credit card. Therefore, this expense will always need to be reimbursed after the trip is complete.

It is important that all pertinent information be provided so that your Case Manager has the documentation needed to submit the request for approval.

- **Helpful Documents:** You are encouraged to attach any additional documentation or information that you feel would be helpful.
- **Signatures:** If you have a guardian, the guardian must sign off on the request

Once all the required information is received, your CFPD Case Manager will submit your request. Fulfillment of the request is contingent upon the approval of CFPD. Please contact your CFPD Case Manager with any questions regarding the supplemental need request process.



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 Denver, CO 80222
 Main: 303-733-2867
 Fax: 303-733-2862
www.cfpdtrust.org

Travel Request Form

CFPD Beneficiary:	
Guardian (if applicable):	
Service Agency/Case Manager (if applicable):	
Requesting Party and relationship to beneficiary:	

Please answer the following with as much detail as possible:

Who is going on the trip:	
Relationship of companion to beneficiary:	
What is the destination(s)?	
When is the proposed trip:	
Purpose of the trip:	

Please list all benefits, including Type of Social Security Income, Medicaid Waivers, other income, Food Stamps, & Section 8.

Government Benefits:	
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Please provide a breakdown of dates and costs, including lodging accommodations, vendors, reservation confirmations, and other pertinent information for each category.

Expense	Description	Budget
Transportation: (airfare, rideshare, public transit, etc.)		
Rental Car		
Lodging/Hotels:		
Meals:		
Entertainment:		
Other:		

TOTAL:

Beneficiary/Guardian Signature _____	Date _____	
Signature of Requesting Party _____	Date _____	

Please return the completed form to your assigned Case Manager/Trust Administrator or use the following: Email: PooledRequest@cfpdtrust.org Fax: 303-597-0241
 Address: CFPD, Attn Requests, 1355 S. Colorado Blvd. Suite 920 Denver, CO 80222