Travel Checklist

Pre-Travel

- Review Quick Reference Guide
- Review the following with your department/unit’s travel representative
  - Payment methods: Diners Club card, CABS, cash advances (for international and student travel), P-Card (for conference registration and student travel)
  - Per-diem allowances
  - Funding sources (State, Federal, Trust)
  - Special circumstances (e.g. combining personal and business)
- Follow your unit’s pre-trip authorization process to secure appropriate approvals

Plan your trip

- Review Book Travel web page
- Register for conference, if applicable
- Book lodging
- Book transportation

If traveling internationally

- Submit itinerary to Global Travel Registry
- Apply for travel health insurance
- Contact the Campus Health International Travel Clinic for information on immunizations and medications
- Review passport/visa requirements for your destination and secure passport/visa if needed
- Print your UNC Emergency Information Card
- Review your phone plan and consider upgrading to international data and calling
- Alert your credit/debit card companies of international travel
- Photocopy your credit cards and passport to leave at home for easy access to information in case of emergency

While Traveling

Receipts and Documentation to Keep:

- Lodging (“Folio” or itemized receipt)
- Conference agenda, if applicable
- Transportation:
  - Ground (e.g. taxi, Uber, shuttle, train)
  - Rental vehicle
  - Gas (rentals only)
  - Parking
  - Flight, baggage
  - Boarding pass (if required by funding source)
  - Mileage documentation (e.g., Google, Mapquest)
- Non-individual business meals (itemized); see Policy 1263 for additional information
- Currency exchange receipts, if applicable
- Other business expenses (e.g., supplies)

Post Travel

Submit reimbursement request form and receipts within 30 days of return:

- Follow unit’s authorization process and forms
- Submit trip itinerary (if required by department)
- Include justification memo for any unusual charges, lost receipts, change fees, etc.