PRE-TRAVEL

☐ Review Quick Reference Guide.
☐ Review the following with your department/unit’s travel representative:
  ○ Payment methods: Travel & Expense (T&E) Card, Airfare – Direct Billing, P-Card (For conference registration and student travel).
  ○ Travel Allowances, Mileage and Per Diem Rates.
  ○ Funding Sources (State, Federal, Trust).
  ○ Special Circumstances (e.g., combining personal and business).
☐ Submit for pre-travel approval in Concur Request.

Plan Your Trip

☐ Review Book Travel page.
☐ Register for conference, if applicable.
☐ Book lodging.
☐ Book Transportation.

International Travel

☐ Review registration requirements on UNC Global site.
☐ Apply for travel health insurance.
☐ Contact Campus Health International Travel Clinic for information on immunizations and medications.
☐ Review passport/visa requirements for 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, including Bank of America for T&E Card use abroad.
☐ 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:
  ○ Rental Vehicle.
  ○ Gas (rentals only).
  ○ Parking.
  ○ Flight, baggage.
  ○ Ground (e.g., taxi, Uber, shuttle, train).
  ○ Boarding pass (if required by funding source).
☐ Non-individual business meals (itemized – see Policy 1263 for additional information).
☐ Currency exchange receipts, if applicable.
☐ Other business expenses (e.g., supplies).

POST-TRAVEL

☐ Faculty and Staff will complete their expense report in Concur Expense and submit for approval.
☐ Submit for reimbursement within 30 days of the last day of travel.
☐ Submit trip itinerary (if required by department)
  Include justification memo for any unusual charges, lost receipts, etc.