Travel Checklist
The University of North Carolina at Chapel Hill

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.

Campus Box 1230
104 Airport Drive, Suite 3500
Chapel Hill, NC 27599-1230
919-962-0210
Concur: concur@unc.edu
Travel: travel_team@unc.edu

Service Center of Excellence in the UNC Division of Finance and Operations
fo.unc.edu/service-center-excellence • FOservicedelivery@unc.edu • 919-445-0800
400 Roberson St., Carrboro, NC 27510 • Hours of Operation: M-F 8 a.m. to 5 p.m.