



# 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.



FINANCE AND OPERATIONS  
Finance and Budget

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