The University of North Carolina at Chapel Hill

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 14 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.

Visit travel.unc.edu to view the most updated resources.
* Last updated Sept. 2019