

Travel Checklist

Visit travel.unc.edu
to view the most
updated resources.

* Last updated Sept. 2019

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)
 - Flight, baggage
 - Rental vehicle
 - Boarding pass (if required by funding source)
 - Gas (rentals only)
 - Mileage documentation (e.g., Google, Mapquest)
 - Parking
- 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.

