

PHCO STEP BY STEP TRAVEL GUIDE

Pre-Travel

- Review [Travelers Responsibilities](#)
- Be prepared to provide:
 - Explanation of travel
 - Planned payment options:
 - [Travel & Expense \(T&E\) Card](#)
 - [Airfare – Direct Billing](#)
 - [P-Card](#)
 - Any circumstances outside of business travel (e.g., combining personal and business).
 - Expected Expenses
 - Cash Advance requests
 - [Per Deim requests](#)
- Update your [profile in Concur](#)

Booking Your Business Travel Trip

- Review [Travel Guide, Travel Checklist](#) and [Fly American Act](#) (waiver [here](#))
- Submit for pre-travel approval in Concur Request ([step by step guide on page 22](#))
- Once pre-travel approved, [make a trip booking in Concur](#) or contact [World Travel, Inc](#)

International Travel

- Carolina is prohibiting University-affiliated international travel unless approved via one of the processes outlined here: [Travel Policies and Exceptions - UNC Global](#)
- * Requires SOM and Deans Office/office of provost approval

While Traveling

Purchases

- [When to use T&E or Pcard](#)
- Understanding Receipts ([step by step guide on page 85](#))
- Logging receipts quick tip guide:
 - [Email](#)
 - [Mobile App](#)
- Non-individual business meals (itemized – see [Policy 1263](#) and [Policy 1501.5](#) for additional information).

Post-Travel

- Faculty and Staff will complete their expense report in Concur Expense. ([step by step guide on page 90](#))

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- Include justification memo for any unusual charges, lost receipts, etc ([step by step guide on page 110](#))
- Submit for reimbursement within 30 days of the last day of travel (if applicable). ([step by step guide on page 100 and 113](#))
- Submitting the Expense report ([step by step guide on page 142](#))

Helpful Links

- ***Business travel FAQ***
<https://finance.unc.edu/services/travel/get-help/business-travel-faq/>
- ***Concur Guides***
[Concur Quick-Start Guide](#)
[Concur Step-by-Step Guide](#)
- ***Policy References***
[Understand Policy - Finance and Budget \(unc.edu\)](#)
- ***UNC Travel Site***
<https://finance.unc.edu/services/travel/>

- ***Get Help***

<https://finance.unc.edu/services/travel/get-help/>

PHCOTravel@unc.edu

- ***Coronavirus***

<https://finance.unc.edu/news/2020/03/09/qa-university-business-travel-affected-by-coronavirus/>