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

- 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


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