UNC Charlotte | Know Before You Go: The Travel Process Simplified

**Before Travel**

<table>
<thead>
<tr>
<th>START</th>
<th>Is Trip &gt; 35 Miles Away &amp; Overnight?</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td><strong>Complete a Travel Authorization Form (“TA”)</strong></td>
</tr>
<tr>
<td>NO</td>
<td><strong>TA is not needed</strong></td>
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</tbody>
</table>

- **Submit approved TA to Travel Office at least two weeks prior to travel**
- **Use P-card, when possible, to pay for required travel costs (e.g., registration, airfare, & hotel)**
- **Notify Export Control Office prior to international travel**

- **If personal travel is involved:**
  - For airfare: attach cost comparison
  - Remember that P-cards cannot be used for personal expenses

**During Travel**

- **In general, do not pay for others unless using an authorized P-card**
- **Itemized Receipts:** Required for most expenditures
- **Exception:** Subsistence meals and tips
- **Keep agenda to support allowable subsistence**

- **What if your receipt is missing?**
  - If > $25, complete a Missing Original Receipt Affidavit and attach to TRER
  - If ≤ $25, indicate on TRER what expense was incurred and that the receipt was lost

- **Tip Limits - General**
  - **Meals:** included in State subsistence rate allowance; no excess reimbursement is generally allowed
  - **Other than meals:** should not exceed 20% of cost of service provided
  - **Airports / Hotel:**
    - Baggage Handling & Skycaps ≤ $2/bag
    - Shuttle drivers ≤ $2/bag
  - **Parking / Auto Related:**
    - Valets (where valet is the only option): $2/car when collecting car
    - Taxi or car service drivers: no more than $5.00 per trip
  - **Hotel Housekeeping:** ≤ $3/night

- **Mileage to / from Airport**
  - If claiming the standard 15 miles each way to Charlotte-Douglas Airport, no map documentation is required

**After Travel**

- **If a TA was submitted, complete a Travel Reimbursement & Expense Report Form (“TRER”) and attach supporting documentation**
- **TRER must be submitted within 30 days**
  - taxable after 60 days

**If personal travel is involved:**
- **For airfare:** attach cost comparison
- **Remember that P-cards cannot be used for personal expenses**

This is a condensed overview of commonly requested travel information.

Refer to the Travel Manual for comprehensive travel guidance.

Visit the Travel & Complex Payments website for links to current travel forms, rates and all other resources.

Version 9.11.2018
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