Individual Employee Travel Guidelines –Pre Travel

Prerequisites:
• Traveler must have a valid PID (Affiliates) or VID (Non-Affiliates);
• Traveler must be affiliated with a University department;
• Traveler must be in Vendor Database; **AND**
• Traveler must have an ACH payment address in the Vendor Database, if applicable.

For Airline Reservations (CABS): Traveler
Maupin Travel is the preferred vendor for CABS (Central Airfare Billing) processing.
   1. Traveler contacts Maupin Travel to request flight itinerary.
   2. Traveler selects/obtains final itinerary from Maupin, including itemized pricing (flight cost + Fee = Total Amount).
   3. Traveler completes the Travel & Training form (see example) section 1, 2 and 3 providing traveler information. The Pre-Travel section 4 of the form details the costs, section 5 is available to provide further detail and information. Finally, the traveler obtains authorized signatures in section 6. Remember to include the required CC1 when adding Chartfield information.
   4. Traveler/Supervisor provides the Business Hub with both completed Travel & Training form & final flight itinerary with itemize pricing included.
   5. The request is processed through the Business HUB.
   6. Once processed, the traveler will receive the CABS Number from the Business HUB. The traveler is to provide the CABS Number to the Maupin agent to complete the Airline Reservation. There is a 24 hour hold on airfare. There is also a 15% threshold that Maupin is permitted to book over the hold amount.
   7. Please plan to submit travel in the morning to the business hub to process and obtain approvals within the time frame required.

For Registration:
Registration for Conferences
1. Paperwork for Pre-Registration should be submitted with the Travel & Training Form.
   A. With Airfare
      i. Traveler submits the Travel & Training Form that includes both Airfare information (from above) and detailed Conference Registration Fee information.
      ii. Traveler chooses preferred payment method for the Registration Fee – Indicate from the Drop Down Box:
         • **UNC Check** – Include conference “Remit To” address
         • **PCard** – for WORKS processing
            1. Traveler makes Pcard purchase
            2. Completes Receipts Purchase form for WORKS processing
Note: Staff members can purchase multiple individuals registrations on their pcard for other staff members

B. Without Airfare
   i. Traveler Submits the Travel & Training Form that includes detailed Conference Registration Fee information.
   ii. Traveler chooses preferred payment method** for the Registration Fee – Indicate from the Drop Down Box:
      • UNC Check – Include conference “Remit To” address
      • PCard – for WORKS processing

1. Traveler makes Pcard purchase
2. Completes Receipts Purchase form for WORKS processing

**Note: The preferred method of payment for Registrations is with the University PCard.

Travel Advances
Travel advances may be made when necessary to enable faculty/staff/s to travel to foreign countries. Students may receive advances as necessary to travel on official University business. These advances are, in effect, loans made to travelers. The traveler is responsible for prompt repayment of any advance or loan and must seek reimbursement for expenses incurred by submitting this form Travel Advance Reimbursement Form. Travel advances are not for social activities, airfare, taxis, baggage fees, shuttles. Travel advances should only be used for food and hotels only.

Note: UNC Policy for Travel Advances

Diners Club
When the professional staff travel for University business, a number of expenses must be paid out of pocket and reimbursed to the traveler after the trip. The university recognizes that this may present a financial burden to staff members, and the Diners Club Card is an option to mitigate that burden. By using the Diners Club Corporate Card, the traveler is given sufficient time to receive reimbursement via Web Travel, provided the travel documentation is submitted in a timely manner. Charges to the card are the personal responsibility of the cardholder. If you are interested in applying for a Diners Club Card, please contact your business hub for more information. Diners Club Card Information

Note: The University is in the process of switching from diners club in August or September of 2019

All pre-travel costs and approvals
Employee traveler completes section (1-5) of the travel training form, and the pre-travel details of the requested trip, purpose, projected costs for airfare, registration, meals, lodging mileage, and other. Provide further details about the travel registration (if to be paid by check) or other information in the notes box. Approve and obtain supervisor approval for the trip and budget in box 6.
**GENERAL INFORMATION**

Student Affairs Org Dept:  
Connect Carolina Department:  
Program:  
Dept. Specific (CC2):  
Event Location:  
Fund/Source:  

**TRAVELER INFORMATION**

Full Name:  
PID:  
Home Address:  
City, State, ZIP:  
Birth Date:  
(required for flights)

**TRAVEL/TRAINING INFORMATION**

Travel/Event Address:  
Travel/Event Date(s):  
UNC/Home Departure Time:  
UNC/Home Arrival Time:  
Conf/Event Name or Purpose:  

**PRE & POST-TRAVEL CHARGES**

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**NOTES:** (Please include the Due Date & Address for Registration pre-payments and any other pertinent info.)

**SIGNATURES AND CERTIFICATION**

Traveler:  
Supervisor/Director:  
Date:  

**Note:** Individuals will only be reimbursed for approved charges they directly incurred and for charges that are approved by UNC Policy.