Ecos Traveler Checklist

Certifications

☐ Sign annual travel certification (ea. July or before first trip)
☐ Complete authorized driver certification (every 4 years)

Pre-Travel

☐ Get Approval: Email supervisor general details of trip (who, where, when, why, how)
  a. Ex: Traveling to Phoenix with Jane Doe for XYZ conference from 8/15-8/23; will book conference hotel and drive personal vehicle
  b. Include with travel packet submission

☐ Hotel: Book at/below max lodging rate
  c. Exception for conference hotel
  i. Provide copy of conference hotel rates and what is included from website

☐ Airfare: Book most direct, reasonable flight available
  d. Not expected to fly at unreasonable times or on unreasonable routes
  e. Work with admin team if planning additional trips or personal travel before/after
  f. International trips – connect with admin team regarding air carrier limitations

☐ Vehicle: Secure vehicle from NAU Fleet Services and provide project code or account
  g. Personal vehicle is an option if needed; make sure driver cert. completed
  i. Must include approval email from supervisor to use personal vehicle in travel packet
  h. Non-NAU rental as last resort; explanation required

☐ Conference: Register for conference if applicable
  a. Provide copy of registration fee details from website that outlines what is included such as meals
  b. Provide conference agenda with travel packet

Travel

☐ Itemized receipts: keep or take pictures of receipts for all charges that will be reimbursed
  a. Not required for meals (exception for camp food; connect w/ manager)
  b. If receipt not available, write down purchase, amount, and date then have vendor sign
  c. Anything can be accepted as a receipt with this information - even a leaf

☐ Mileage: personal vehicles only
  d. Choose either map miles or odometer (tracking required w/ odometer)
  e. If not leaving from NAU, commute miles (to/from home and NAU) must be deducted

Post-Travel

☐ Exhibit J: due back to admin team within five days of returning
  a. Refer to Ecos’ Exhibit J Tutorial, Travel Presentation, and Travel Handout.

☐ Attach itemized receipts for all expenditures (either electronic or hard copy accepted)
☐ Attach currency conversions if applicable (electronic copy preferred)
☐ Attach conference details if applicable (refer to pre-travel section)