

EcoSS 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 EcoSS' 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)