

Traveler Name \_\_\_\_\_ Travel Dates \_\_\_\_\_ Destination \_\_\_\_\_

## DOMESTIC TRAVEL CHECKLIST

✓ DATE	NOTES
	Obtain Department Head Approval.
	Complete electronic travel request. Attach invitation, funding confirmation, calendar, and any other document necessary for review.
	Enter trip into PIP-II Travel Database.
	Notify Traci/Tatiana when TA ready for review.
	Make changes if needed and route trip for approvals. Add Traci as reviewer. <b>NOTE:</b> Trips on PIP-II funds, add Chris Jacobsen as funding approver. Trips on funds or other than PIP-II, list funding approver noted for specific task.
	Do you have Travel Office approval to commit funds? <input type="radio"/> Yes <input type="radio"/> No If funding approval not yet received, continue to follow-up. Note date that approval email is received: Approval Date: _____
	Pay registration fee if required. Ensure that we have funding approval <u>before</u> paying fee.
	Contact Travel after funding approval is received: <ul style="list-style-type: none"> <li>• Finalize airfare, lodging, car rental, as applicable.</li> <li>• Obtain documented approval from traveler of all arrangements.</li> </ul> Include a copy of the finalized itinerary in the file.
	If traveler made their own lodging reservations, obtain confirmation.
	If conference travel, send the following email: Our DOE contractual requirements regarding Export Control now require us to collect posters and slides for all conferences. Please request a Fermilab report number for each of your posters, slides and papers and upload to <a href="http://lss.fnal.gov/cgi-bin/getnumber.pl">http://lss.fnal.gov/cgi-bin/getnumber.pl</a> . Please email <a href="mailto:techpubs@fnal.gov">techpubs@fnal.gov</a> or call X5693 for further information or assistance.
	Make Limo reservations.
	Prepare travel packet.

### TRIP COMPLETED

	Ensure that personal time taken M-F is reflected as vacation in FTL.
	Request receipts from traveler.
	Reconcile Expense Voucher ( <b>within 10 days</b> ) and submit for review. Attach supporting documentation (i.e., receipts).
	When response is received with comments, make changes if needed and route voucher for approvals. NOTE: Chris Jacobsen is approver on all PIP-II funded trips.
	Following receipt of all approvals: <ul style="list-style-type: none"> <li>• Print approved voucher, approved TA, and approval to commit funds.</li> <li>• Attach original receipts.</li> <li>• Mail or take all documents to Accounting, MS112 (Elena).</li> </ul>
	Update PIP-II Travel database: <ul style="list-style-type: none"> <li style="width: 50%;">• Check off <i>Voucher to Accounting and Closed Out boxes</i></li> <li style="width: 50%;">• Enter <i>Voucher to Accounting (date)</i></li> <li style="width: 50%;">• Delete <i>Estimate Total</i></li> <li style="width: 50%;">• Enter actual expenses (including cents)</li> </ul>