

Travel Checklist

Note: The purpose of this document is to highlight key parts of the travel process and to help expedite it. It does not contain specific information on rates and regulations. Those can be found in the current [PPM-49](#) state travel regulations.

Before travel

- **Create an online TA.** Make sure it is approved before continuing.
- If FLYING, it is mandatory to book airfare through [Shorts Travel](#).
 - If flying from New Orleans Airport, make a parking reservation online with [Park'N'Fly](#) using the state promotional code 0050930 (the Park'N'Fly link has discount pre-applied). If you do not make a reservation, you will need a state ID and [tax-exempt form](#) when paying.
 - If flying from Baton Rouge Airport, the state's contract rate is \$3.50/day. Documentation required to receive this rate is a State ID and [Airport Certificate](#).
- If DRIVING, will the roundtrip mileage be greater than 99 miles?
 - If NO, then you can take your personal vehicle and claim up to 99 miles.
 - You must support your mileage claim with either odometer readings or a printout of a map route from a site such as Google Maps or Mapquest.
 - When driving from your house, you must claim **the lesser of** the miles from your official work domicile or from your residence. You must note your home address when traveling from home.
 - If YES, then you are encouraged to use a rental vehicle. Fill out the online [Vehicle Rental Form](#) before renting and give Enterprise the State's Acct #: NA1403.
 - You must select the type of vehicle you are renting on the form. Any rental larger than standard-size must include justification and be approved on the Vehicle Rental Form.
 - If you use a rental vehicle to travel out-of-state, you must attach a quote from Shorts Travel and prove that it is the most cost effective method.
 - Gas receipts must be itemized. Prepaid receipts are **NOT** reimbursable.
- For LODGING, find the state lodging rate limits for the area you are traveling to.
 - Check with your hotel to see if they honor state rates - many do.
 - If you are traveling in-state, you will need to bring an approved [hotel tax-exempt form](#) with you to the hotel.
 - If you are traveling to a conference and the conference hotel rate is higher than the state rate, request approval for the increased lodging rate by completing the [Hotel Overage Request form](#), which needs approval by the budget unit head and the appropriate Vice President. Attach documentation that lists the conference hotels.
 - If you are traveling for other reasons, and cannot obtain lodging for the state rate or lower, you may get approval for no more than 50% over the state rate for that area by completing the [Hotel Overage Request form](#) and obtaining the appropriate approvals. You must include documentation that you attempted to get the state or best rate.
 - If you share a room with another approved traveler, you may get the state rate multiplied by the number of people that are sharing a room.
- Registration fees for conferences are eligible to be paid for with the Pcard but may also be reimbursed if paid for with a personal card. Membership fees cannot be reimbursed through an expense account and are not considered a travel expense. Contact your purchasing agent for membership fees.
- Travel Advances are available when spending personal money on AIRFARE, LODGING, or REGISTRATION prior to traveling. An approved [Travel Advance Agreement/Request](#) must be turned in with receipts.
- State sales taxes charged (other than at restaurants) is typically not reimbursable. Please contact the Purchasing Department to receive a tax exemption form. This is only needed for **Louisiana State Sales Tax**.

During travel

- Keep your receipts! Most expenses require that you turn in original receipts to be eligible for reimbursement.

After travel

- Complete the **EXPENSE ACCOUNT FORM** and include any expenses that were paid for with a travel advance or Pcard.
 - Itemize expenses daily in each section of the Expense Account form. If more lines are required in any section, attach a separate page/spreadsheet as needed. Do **not** use multiple Expense Account forms for one trip.
 - Note on the expense account "Pcard" or "Advance" in the drop-down box for any expenses that were paid for with a Pcard or travel advance, respectively.
 - Note on the expense account when you are sharing lodging or sharing transportation with another employee.
- Attach the conference agenda if travel was to a conference.
- Have the budget unit head approve the form.
- Submit the form with receipts to the Travel Desk at SLU 10720.

Top five travel mistakes (refer above for specifics):

1. You are limited to 99 miles for reimbursement in a personal vehicle. Use rental vehicles for trips that are longer than 99 miles. Use the state's contract code with the rental agency.
2. Getting hotels that are above the state rate. Know the state lodging rates and **always** request to get a rate within the state's rate limit. If that specific hotel does not honor the state rate, search for another hotel in the area that does. Use a hotel overage form when applicable.
3. Original receipts are required. No scanned receipts are acceptable. Gas and restaurant receipts must be itemized. Prepaid receipts are not reimbursable.
4. Getting charged for state sales tax. Any state sales tax should be removed before your final bill. State sales tax will not be reimbursed (with the exception of being charged at restaurants).
5. Should park at Park'N'Fly when parking at New Orleans Airport. Parking at New Orleans Airport is limited to \$7/day and the state's contract with Park'N'Fly is within that rate.