

Pre-Travel Checklist

(Not a Required Travel Document)

Purpose

The following are items to consider before going on Research Foundation (RF) business travel. This checklist is only a convenience and is not required to be submitted with other travel documents.

Audience

- Travelers on RF business
- Individuals responsible for making travel arrangements

Does the trip meet all sponsor guidelines?
Are there sufficient funds to cover the cost of the trip?
Is the trip within New York State? If so, obtain an " Exempt Organization Certification " and understand the RF's acceptable use policy.
Is a rental vehicle being used? If so, review Insurance Guidelines for Vehicles in the RF Travel Handbook . Also, does your campus require written justification for the use of a rental vehicle? If so, attach written justification to the travel form.
Is travel on a federal grant and will the traveler be using a commercial airline? If so, prior to booking an airline ticket, make sure the airline is a "U.S. flag air carrier" as described by the Fly America Act .
Is an advance required? If so, contact your operating location's travel office for its policy on travel advances.
Does the traveler understand the RF and campus policies regarding what expenses are reimbursable? Does the traveler understand what documentation (including receipts) is required to obtain reimbursement?
Does the rate of the chosen hotel exceed the maximum federal per diem rate ? If so, make sure proper approvals are obtained, and, if required, attach a justification.
Is travel to a foreign country? If so, travelers should review sponsor regulations, award terms, and conditions prior to traveling out of the United States. Many sponsors have different requirements for foreign travel.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.

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