



Travel Tools & Quick Reference

BUSINESS TRAVEL & MILEAGE CHECKLIST

Use this checklist before, during, and after travel to support compliance with HR 312 and HR 522.

Before Travel

- Confirm business purpose, dates, destination, and funding source with your supervisor.
- Determine if your trip needs a PTR. A pre-approved PTR is needed for:
 - Staff-purchased, reimbursable expenses such as airfare, lodging, and vehicle rentals.
 - PFC-purchased expenses such as conference registrations.
- If requesting a travel advance, in addition to the PTR above, submit a check request form.
 - Must include expense estimates and other supporting documents, such as hotel or ticket fare print-out.
- Confirm your duty station and how you will calculate mileage.
- Verify you have:
 - A valid driver's license.
 - Required auto liability insurance.
 - A safe, legally registered vehicle if using a personal car.
 - Completed PFC's annual insurance attestation.

During Travel

- Track your destinations and dates for mileage documentation.
- Note your departure and return times for per diem eligibility.
- Retain required receipts (parking, tolls, fuel for rentals, misc. business expenses).
- Follow safe-driving rules as outlined in HR 522.

After Travel

- Complete the official Expense Report within 30 days of completing your travel.
- Include all travel dates, destinations, mileage, per diem meals, and allowable expenses with supporting documentation.
- Reconcile any travel advances on the expense report.
- Batch regular travel into a single monthly expense report per grant/funder.
- Submit the expense report with supporting documentation for supervisor approval.
- Monitor the status of reimbursement and respond promptly to any questions from Finance.



Travel Tools & Quick Reference

QUICK REFERENCE: DO I NEED A PTR?

A PTR is required when your travel includes: (employee purchases, and is reimbursed or requests advance)

- Airfare or train fare.
- Lodging for overnight stays.
- Rental vehicles.

A separate PTR is required when your travel includes: (PFC office purchases)

- Conference or registration fees.

A PTR is not normally required when:

- You are driving your personal car for local, same-day business travel.
- You are only requesting mileage reimbursement for routine in-town meetings.

QUICK REFERENCE: CAN I CLAIM PER DIEM?

You can claim meal per diem when:

- You are in overnight travel status at least 35 miles from your duty station or home (whichever is closer).
- The meal is not provided as part of a conference or meeting, with limited exceptions (such as hotel breakfast).
- Your departure and return times meet the time requirements for breakfast, lunch, and dinner per HR 312.

You cannot claim per diem when:

- You are commuting between home and PFC.
- You are not in overnight status (except in specific, pre-approved situations such as certain hosted lunch meetings). See **HR 312, Meals (*per diem*)**
- The meal is already provided and covered as part of a conference or event, except in limited, clearly defined cases.