Traveler’s Checklist

1. Familiarize yourself with the Business and Travel Expense Policy
2. Request approval for trip
   a. use this form OR
   b. send an email request to your supervisor
3. Arrange Travel
   a. Use the travel portal: Airlines, Amtrak, Lodging, PATH and NJ Transit
   b. For domestic car rental use the preferred providers, contact purchasing@stevens.edu
   c. Pay for the travel, retaining ALL receipts, using:
      i. Your Pcard
      ii. Departmental PCard
      iii. Personal Credit Card or other “employee out of pocket” method
         You can be reimbursed by Stevens under an “accountable” plan – with the amount substantiated by receipts and explanation
4. Travel
   a. Expenses incurred during travel can be paid using
      i. Your PCard
      ii. Departmental PCard
      iii. Personal Credit Card or other “employee out of pocket” method
         You can be reimbursed by Stevens under an “accountable” plan – with the amount substantiated by receipts and explanation
   b. Keep all receipts
      i. Meal receipts need to be the itemized showing food, beverage, tax, gratuity…all alcohol MUST be itemized
5. Within 30 days of return from travel, submit a TABER (Travel and Business Expense Report)
   a. Please be sure to use the most current version of the TABER form.
   b. Complete all fields that apply to the business expense.
   c. Expenses must be broken out and reported in the specific categories listed on the TABER.
   d. For each trip/event you must chose to either use the per diem amount or the actual expense amount for the entire trip/event. You cannot mix and match for each identifiable trip/event.
   e. If choosing to be reimbursed for actual expenses, then itemized receipts are required for all meals/food. All alcohol must be listed separately.
   f. For mileage reimbursement using your personal vehicle:
      i. Attach a google maps/mapquest showing the route and the total mileage which agrees with the requested mileage reimbursement calculation
      ii. Visit Mileage Reimbursement Rate Information web page to ensure you are using the most current rates
   g. Secure all required signatures.
   h. Prepare or have a DV prepared on your behalf
      i. Scan and electronically attach all back up to the DV, including the approved TABER. No paper copies are required by AP. You may retain them in the department until the DV has gone to FINAL status.