

# LC Travel CHECKLIST



The following are the steps and procedures required for Lee College employee travel. Please review thoroughly to ensure comprehension and adherence to guidelines.

## 1. APPLY FOR TRAVEL

- Seek approval from supervisor
  - Review most recent [Travel Guidelines](#)
  - Fill out the [Empirical Educator Center travel application](#)
    - Get signatures on application
- Return application to EEC  
Receive funding information form

## 2. PREPARE FOR TRAVEL

- If you have a Purchasing Card ...
  - Prepare cc approval form with all anticipated travel related purchases and obtain signatures
- If you do *not* have a Purchasing Card and need a Travel Card
  - Complete [Travel Card Application](#) and obtain signatures
  - Complete [Travel Card Agreement](#)
  - Pick up Travel Card from Purchasing and set 4-digit PIN
- Make approved purchases

## 3. DURING TRAVEL

- Keep all receipts for anything bought with a Lee College Purchasing or Travel Card

## 4. AFTER TRAVEL

- Return Travel Card to Purchasing
- Complete Statement of Travel Expense (see next page)

## TRAVEL TIPS

- It is easier to use your own money to pay for meals when traveling
- If using p-card/travel card to pay for meals, you will **not** receive per diem.
  - Receipts are required to be turned in.
  - Meals need to be tax-exempt if in Texas.
  - GSA overage will be required to be paid back to college.
  - See Grant guidelines on GSA rates and tipping in [Travel Guidelines](#).
- Rental cars will not accept travel cards
- Ubers and ride share to/from airport or conference are allowable
- [Hotel Tax Exemption form](#)
- [Sales Tax Exemption form](#)
- [Rental Car Tax Exemption form](#)



# Statement of Travel Expense CHECKLIST

## S.O.T. CHECKLIST

- [Statement of Travel Expense form](#)
- Anything paid for with a Lee College Purchasing Card or Travel Card will go under “Lee College MASTERCARD”
- Complete requestor, destination, and travel dates
- Ensure that Dept ID, Fund, and Account numbers are correct
- If requesting mileage, include map to verify miles traveled (Google Maps, MapQuest, etc.)
  - Frequent locations: [Mileage Chart Location Key](#) ... these do not require map
- Include receipt(s) for public transportation (flight, Uber, taxi, etc.)
- Include receipt for hotel
- If requesting per diem ... Complete and include [per diem calculator](#) and GSA rate for location
  - In Texas, use GSA rates provided on SOT form
  - If you used Lee College card to pay for **any** meals, you will not receive per diem. Please provide receipts for all meals bought. Any GSA overages will need to be paid back to college.
- Include receipts for other expenses (registration, airport parking, etc)
- Total expenses for each side
- [Statement of Travel Expense EXAMPLE](#)