Travel Checklist

Pre-Travel:
- Determine sponsorship for trip and obtain authorization
- Complete pre-travel authorization forms and submit to supervisor.
- Plan your trip itinerary carefully. *International trips must be coordinated through the Wang Center for International Programs; local trips should be planned using your department guidelines and university purchase policies.*
- Arrange transportation with insured vendors and procure vehicles with adequate space. *Do not coordinate or suggest carpools.*
- Complete *Emergency Information Template*
- Communicate the following information to participants in advance of travel:
  - itinerary
  - dangers, hazards, and risks they will assume
  - precautions about personal possessions
  - discuss expectations including alcohol policy
  - pre-travel medical requirements and instructions for obtaining same
  - encourage personal insurance policies
  - explain medical treatment protocol away from campus
  - explain purpose of medical statement and provide instructions for completion
  - select and administer appropriate waiver(s)

Collect and/or distribute prior to departure:
- Obtain signed waivers from every participant if appropriate—retain on campus.
- Obtain and take with you completed and signed medical statements from every participant
- Leave a detailed itinerary and emergency phone numbers with someone on campus
- Get travel advances or a purchasing card from the Business Office
- Leave credit card information, traveler’s check numbers, and copy of passport in a safe place

Take with you and carry throughout travel:
- Completed *Emergency Contact Template*
- *Emergency Management Instructions*
- Sealed medical statements (It is recommended that you put them together in an envelope and keep in the leader’s briefcase.)
- Cell phone and recharging unit

Upon return:
- Shred medical statements or send to Health Center in a sealed envelope with note to shred
- Shred participant telephone numbers and other personal information
- Submit signed *Travel Expense Voucher* and/or *Auto Mileage Reimbursement* forms to the Business Office within 15 days and include monies owing to the university for travel or medical expenses. *Submit expense vouchers to the Wang Center for International Programs for Wang Center Programs.*
- Store waivers for three years in department files or send to Finance and Operations
- Provide post-travel documentation to your department and the Wang Center for International Programs as required.