Pre-departure Checklist for Travel Program Directors

This checklist is designed to help program directors with administrative steps, particularly after the program’s enrollment threshold has been met and/or a final ‘go’ decision has been made. This is not an exhaustive list.

Student-Related

- **Update student application via StudioAbroad.** Ensure all students participating in the program appear on your program roster. If a student is not participating, withdraw the application.

- **Perform ‘progress audit’ report via StudioAbroad to ensure all students have completed required tasks.** This includes Assumption of Risk and Release, Authorization for Medical Procedures, Medical Questionnaire, Emergency Contact information, and program payments, along with any additional tasks you require. For international programs, HTH insurance and the Smart Traveler Enrollment Program registration is also required. While Global Initiatives supports this process, it is ultimately a director responsibility to ensure all tasks are completed prior to departure.

- **Review course roster to ensure all anticipated students are registered.** If a student is not listed, prompt them to submit course registration form. If student is listed, but no longer participating, alert global@miamioh.edu. A student must be withdrawn by our office no later than 4:30pm the business day before the start of the course in order to receive a tuition refund.

- **Prior to departure, print off ‘Risk Management Report’ from StudioAbroad, review for completeness and important student information, and carry a hard copy with you during the program for reference in the event of an emergency.**

- **Offer at least one pre-departure orientation session** that covers all required components according to the Miami University Domestic and International Travel Program Guidelines. Global Initiatives will provide a template powerpoint that can be used and should be customized for your program.

Financial (see Purchasing Policy and Travel Program Finances document for more information)

- **Submit final budget revision** to Jessica Williamson (daugheja@miamioh.edu) for official approval. This outlines the approved expense limits for your program, which you will be held accountable for.

- **Request salaries (work with department).** Miami employees’ pay is processed through an EPAF; non-Miami employees are often paid using the BuyWay system. Departmental administrative assistants often assist. Salaries are based on final approved budget.
o **Submit all vendor contracts and other agreements to Global Initiatives (Erin Brandyberry).** Purchasing Policy requires university-level approval (not individual or departmental approval) on contracts. This includes transportation contracts, tour operators, etc. Approval can take 2 weeks or more, and should be completed prior to vendor payments. Global Initiatives facilitates this process for travel programs.

o **Pre-pay vendor payments if possible.** The payments can be made using BuyWay or departmental p-cards. Departmental administrative assistants often assist.

o **Familiarize yourself with Purchasing Handbook,** including prohibited expenses. This can be found on the Accounts Payable website: http://www.units.miamioh.edu/controller/prod/accounts_payable/

o (optional) **Request declining balance credit card.** First, submit non-catalog request via BuyWay for a PO#, then submit paper application to Global Initiatives. Departmental administrative assistants often assist with the request, but Jessica Williamson can assist you in determining the amount to request.

o (optional) **Request cash advance using the Travel Module.** This includes per diem advance for meals not otherwise provided, and other needed cash for program expenses.

**Administrative**

o **Print and review the Emergency Communication Protocol, Title IX and Study Abroad document and the Miami University Domestic and International Travel Program Guidelines.** Directors are responsible for knowing and following these procedural documents.

o **Complete Red Cross CPR certification and other risk management trainings** at least once every two years, as required by the Miami University Domestic and International Travel Program Guidelines.

o **Sign out First Aid/ Wilderness Aid kits from the Aquatics Center in the Rec.** These should be returned to the same office at the end of the program. Contact Jackie Huff with questions at huffj@miamioh.edu.

o **Complete Campus Security Authority (CSA) Mini-course for Study Abroad/Away directors.** This is required by the Clery Act, and managed by the MU Police Department.
- Make arrangements to have an internationally-capable cell phone for risk management. This may include turning on international capabilities on your phone, or purchasing pay-as-you-go phone upon arrival.

- Submit the following to Erin (erin.brandyberry@miamioh.edu). All are required by the Miami University Domestic and International Travel Program Guidelines.
  - Final program itinerary
  - On-the-ground contact information (can be provided upon arrival if necessary). Provide local contact information to students as well, and collect student on-the-ground contact info.
  - Companion Travel Form (if family/guests will be traveling with program)

While Abroad/Away

- Track and submit location information via the electronic ‘Clery Act Location Information’ form. All hotel and classroom addresses and room numbers MUST be submitted in accordance with federal law. This must be submitted within 10 days of return.

- Track all expenses purchased with advance monies (cash or credit card). All original, itemized receipts must be kept for all non-per diem expenses. Transaction logs and receipts must be submitted to Global Initiatives within 30 days of the last travel day of your program. More information will be sent via email to card / cash holders.

- Follow the Emergency Communication Protocol and the Miami University Domestic and International Travel Program Guidelines in the event of any incident, including behavioral, health and safety concerns.
  - Cheryl Young - 513-461-2264
  - MUPD – 24/7/365 emergency number: 513-529-2222 (call collect)
  - HTH – international health insurance: 610-254-8771 (call collect)
  - International SOS – 24/7 travel services provider and emergency responder: 215-942-8478
  - Submit incident reports after emergency addressed.

- Regularly communicate with Erin (erin.brandyberry@miamioh.edu) regarding program developments – lost luggage, travel delays, successes, etc.