2025/2026 Academic Tour Leader Checklist

1 year before the tour:

- ☐ PEG Approval required for new Academic Tours.
- ☐ Contact Leesa to set up a project number for the Tour.
- ☐ Submit a Spend Authorization. The SA should include:
  - ☐ Breakdown of Expenses
  - ☐ Tour fee
  - ☐ General Itinerary
  - ☐ List of chaperones (It is required to have at least 3 tour leaders with the tour at all times. If one of the tour leaders is requesting to extend their dates before or after the tour, those dates must be pre-approved by the Academic VP.
  - ☐ Chaperones that are faculty members or full-time employees should be considered to fill this role before spouse chaperones are considered. Spouse chaperones must be hired as temporary employees through HR.
  - ☐ Security review (Leesa)
- ☐ The Academic Vice President or his designee will review the Spend Authorization for approval.
- ☐ Departments may post on their website and begin the application process.
- ☐ Contact Leesa for the link to your tour's application.
- ☐ Each faculty member must submit an individual SA that includes:
  - ☐ Any expenses not covered by the tour fee
  - ☐ Expenses for professional development
  - ☐ If there are no additional expenses other than what is covered by the tour fee, the faculty member needs to submit a NO Expense Spend Authorization.
- ☐ Send the participant list with I#s to Leesa Allen and Preston Andersen to charge the tour fee to the student accounts.
- ☐ Begin working with Trisha or Nikki on travel arrangements.
- ☐ Trip leaders need to use the project number when reconciling any expenses.
- ☐ Email Chris Wynn to have the tour leader's fees transferred from the Department Cost Center to the Academic Tour account **I:CC345000 Academic Tours-Foreign** along with your **Project# I:PROJ-002926**

4 - 6 Months before departure:

- ☐ Submit a copy of the student passports to the Travel Office if they were not previously submitted on the student's application. Trisha needs by January.

- ☐ Apply for Group Travel Cards. At least two trip leaders should have a group travel card. Apply for a card in Workday. (instructions – separate document)
- ☐ Register your tour with the U.S. State Department. (STEP)
- ☐ Send students the HIPPA form and instructions to sign up for E-refund. (instructions for E-refund and link to HIPPA form)

Six weeks before departure:

- ☐ Check with students to make sure they have signed up for E-refund so they can receive their meal money.
- ☐ Check the status of student payments. All students must be paid in full before departure. (Link to tour tracking that Bracken/Preston set up.)
- ☐ Send Leesa the final itinerary including hotel addresses and phone numbers. Leesa will conduct a final security review & send to the Academic Vice President and designee for review.
- ☐ Schedule a time with Leesa for the safety/security presentation for the students.
- ☐ Pre-departure meeting with Travel Admin and Accounting. (Leesa will schedule)
- ☐ If you need cash/currency to start the tour, contact Tyler Andreasen x1972.

Two weeks before departure:

- ☐ Check the status of student payments for the tour. All fees must be paid in full before departure. (link to website Bracken/Preston set up)
- ☐ Email Preston Andersen (Accounting) copy Leesa - with the amount of meal money to be transferred to the students through E-refund. Preston needs names and I#s.
- ☐ Leaders can pick up meal money checks at the cashier's office.
- ☐ Leesa will deliver Geo Blue and Emergency cards.

One month after returning from tour:

- ☐ Finish reconciling all receipts and expenses.
- ☐ Meet with Academic VP, Travel Administration, Travel, and Accounting for tour re-cap.