Travel Checklist for Yale faculty, staff, and post-doc leaders of undergraduate student travel

**PLANNING**

* **Follow the travel policies and guidelines for undergraduates** (if applicable)
* Yale University [International Travel Policy for Yale College Students](https://cipe.yale.edu/travel-resources/travel-policy)
* Yale University [Academic Field Trips, Field Work, Field Research, and Conferences](https://ogc.yale.edu/aft/academic-events-guidelines)
* **Refer to the Center for Global Education’s** [Resources for Program Administrators](http://globaled.us/safeti/program_administration/index.asp) **for planning help**
* **Remind participants to apply for their** [**visas**](http://us.cibt.com/index.php?login=40634) **and passports**
* **Set the trip cancellation/refund policy and make all participants aware of it**
* Advise participants to consider purchasing travel insurance, especially if the trip could be cancelled due to unforeseeable circumstances.
* **Schedule a group travel health session with** [**Passport Health**](https://www.passporthealthusa.com/locations/ct/new-haven/1018/) **at 203-285-3485 or via** [**accounts@passporthealthusa.com**](mailto:accounts@passporthealthusa.com).
* Follow [**these steps**](https://yale.box.com/shared/static/4a2qe5bn6xclm2q8cpff6t7lyxebacvd.pdf) to arrange for a group travel consultation
* Typically, the cost of participating in a group travel consultation will be considerably less than the cumulative cost of individual travel consultations
* **Acquire a Purchasing Card if necessary; understand Yale** [**P-card and Expense Report**](https://your.yale.edu/policies-procedures/expense-reimbursement) **procedures**
* Work with your business manager for guidelines on proper card use
* The Yale P-card does not work in all countries; contact [Yale Procurement](https://your.yale.edu/work-yale/financial-management/procurement) for assistance
* **Be aware that students may disclose disabilities and mental health or medical conditions; understand your role in providing support**
* **Require travelers to get necessary** [**immunizations**](https://wwwnc.cdc.gov/travel/destinations/list/) **and to understand how their health insurance will work**
* **Determine if Yale travelers or AYA groups visited the region recently, or if Yale alumni live there**

Can they provide recommendations to make planning easier for you?

* Contact the [Yale Alumni Association](https://alumni.yale.edu/).
* **Don’t plan to rent a vehicle for you to transport the group**

Look into contracting with a transportation service or use public transportation or taxis

* Read more about safe road travel abroad: [ASIRT](https://world-toolkit.yale.edu/ASIRT)
* **Complete the** [**Emergency Contact Information**](/sites/default/files/files/Travel%20Site%20Emergency%20Information%207-2022.pdf) **sheet for each of your destinations** prior to the orientation; use the information to help students fill out their emergency contact cards (see below)

**PRE-DEPARTURE ORIENTATION** (about 2 weeks before travel; all participants should attend)

* **Provide travelers with a detailed itinerary**
* Include flight numbers and carriers; name, address, and phone number of all accommodations; methods of travel between sites; other pertinent details
* Travelers should give a copy to their parents/guardian
* **Make sure all travelers have an** [**International SOS card**](https://ogc.yale.edu/sites/default/files/isos_yale_card_12042018.pdf) **or have downloaded and installed the** [**ISOS App**](http://learn.internationalsos.com/LP=4620) **onto their smartphones**
* **Designate a student to serve as alternate leader in case you are sick or injured during the trip**

(if you are the only faculty or staff member leading the group)

* **Require travelers to complete the** [**Yale Travel Self-Assessment**](https://yalesurvey.ca1.qualtrics.com/jfe/form/SV_3jWUApCrxC5NZOK)
* **Discuss crime, culture, health issues, etc. from the International SOS** [**Custom Location Report**](https://www.internationalsos.com/MasterPortal/default.aspx?membnum=11B824535) **for your destination**
* Help the other travelers know what to expect (especially if you’re familiar with the destination)
* Be prepared to answer their questions about your destination
* Consult other resources such as the [U.S. State Dept.](https://travel.state.gov/content/travel/en/international-travel/International-Travel-Country-Information-Pages.html) country information reports, [ASIRT](https://world-toolkit.yale.edu/ASIRT) road reports, etc.
* **Remind students they can voluntarily disclose any conditions that may require accommodations**
* **Discuss behavioral expectations (and potential consequences) with the participants**
* Don’t ignore this responsibility; discussing expectations as a group will generally lead to fewer problems, better group cohesion, and a more successful trip
* Expectations of travelers should include, for example:
  + To follow Yale’s [Undergraduate Regulations](http://catalog.yale.edu/) or other relevant behavioral policies
  + To respect their fellow travelers
  + To not partake in illegal activity or drug use
  + To not do anything that could jeopardize the group’s safety
  + To inform you of any travel independent of the group
* **Emphasize to travelers that they are responsible for their safety and for their actions**
* **Distribute and collect signed student** [**Academic Field Trip Student Waiver**](https://ogc.yale.edu/sites/default/files/files/All%20Purpose%20Waiver%20FINAL%209-27-21.docx) **and** [**Academic Field Trip Information Worksheet**](https://ogc.yale.edu/sites/default/files/files/Academic%20Event%20Information%20Worksheet%207-21-22.docx) **forms**
* Hold the forms for 2 years after the trip

**2 WEEKS BEFORE TRAVEL**

* **Register the group’s travel** (you will register for all participants)
* With Yale: email a completed [travel registration spreadsheet](https://ogc.yale.edu/sites/default/files/files/ExcelNon-GDSBulkUploadFileV2_2_Yale_5-2021.xlsx) to [carolyn.marks@yale.edu](mailto:carolyn.marks@yale.edu?subject=Travel%20Registration%20Batch%20Upload%20Request)
* With the U.S. State Department [Smart Traveler Enrollment Program](https://step.state.gov/step/);

non-U.S. citizens register with their own embassies

* **Obtain a cell phone for emergency use** (or plan to purchase one immediately upon arrival)

**AFTER YOU ARRIVE**

* **Remind participants of behavioral expectations**
* **Show all students the locations of the best hospitals to use and primary and secondary group meeting points** (central locations where everyone should gather if a large-scale emergency affects communication)
* Make sure everyone can find them; physically take the group to the sites if necessary
* **Collect all students’ phone numbers (landline or cell) and addresses** (if using homestays, for example)
* Make sure you can reach all students
* Mark all students’ addresses on a map
* **Make sure all travelers know how to reach you by landline or the emergency cell phone**
* Be prepared to be on call 24/7 for the duration of the trip (but rely on help from Yale administrators and International SOS if there is a problem; you don’t need to handle it alone)
* **Program emergency phone numbers into your cell phone, then make sure they work**
* **Be sure that accommodations, transportation, and activities/excursions are safe**
* Accommodations: working smoke detectors, door and window locks, fire escapes
* Transportation: using licensed drivers and reputable transportation companies
* Activities: relevant to the educational purpose of the trip, not unnecessarily risky
* **Check that students have their International SOS cards in their possession**
* **Think about risks of the trip and your location and how you might respond to possible problems**
* Then help students understand the risks and their roles in a safe, successful trip
* **Assess the trip during and after**, with group leaders and participants

*For additional resources visit*[**http://world-toolkit.yale.edu**](http://world-toolkit.yale.edu)