

OVERNIGHT TRIP WORKFLOW | Trip Leader Checklist

Approval Deadline Overview by Semester

Semester of Travel	Pre-Approval	Budget Approval	Course Credit	Participant Clearance	Wrap Up
Summer (May–Aug)	June (1 yr prior)	2 terms prior	3 months prior	7 working days prior	Within 30 days of return
Fall (Sept–Dec)	June (1 yr prior)	2 terms prior	3 months prior	7 working days prior	Within 30 days of return
Spring (Jan–Apr)	June (2 yrs prior)	2 terms prior	3 months prior	7 working days prior	Within 30 days of return

Visit the **Chief Academic Officer's** webpage for latest trip information and to download required forms:
<https://www.andrews.edu/administration/cao/study-tour-approval/index.html>

PHASE 1 — [PRE-APPROVAL] INTENT TO PLAN OVERNIGHT TRIP		
	Role – Task / Action	Deadline
☐	Trip Leader – Download & submit Overnight Tour/Trip Pre-Approval Worksheet to academic dean and/or service area VP	<i>As set by Dean/VP</i>
☐	Dean/VP – Route complied pre-approval requests to riskmanagement@andrews.edu	<i>Fourth Monday of June</i>
☐	CAO/CFO – Communicate determination of pre-approval requests (pre-approval/denial)	<i>Fourth Monday of July</i>
☐	Trip Leader, if pre-approved by CAO/CFO – start awareness/interest list and prepare to complete next steps of the overnight trip application process for full approval	<i>July (after pre-approval)</i>
☐	Trip Leader, if denied – assess whether to revise and resubmit in current/future cycle	<i>July (or future cycle)</i>
☐	Trip Leader – Attend/watch Overnight Trip Leader orientation meeting/video	<i>August</i>
PHASE 2 — BUDGET APPROVAL		
	Role – Task / Action	Deadline
Non-Academic Trips		
☐	Trip Leader – Complete Non-Academic Budget Appl. & Inc/Exp Worksheet	<i>See “budget approval” deadlines in table above</i>
Academic Trips		
☐	Trip Leader – Complete Academic Course Credit Budget Appl. & Inc/Exp Worksheet	<i>See “budget approval” deadlines in table above</i>
All Trips		
☐	Trip Leader – Obtain academic Dean and/or service area VP designee signature	<i>See “budget approval” deadlines in table above</i>
☐	Dean/VP – Submit full budget application and Inc/Exp worksheets to Associate VP of Finance (valencia@andrews.edu)	<i>See “budget approval” deadlines in table above</i>
☐	Associate VP of Finance – Communicate determination of budget req (approval/denial)	<i>Rolling</i>
☐	Trip Leader – Distribute Student/Non-Student Participant Agreement Forms to all participants	<i>After approval</i>
☐	Trip Leader – If approved: make deposits/payments; update marketing with per-person costs	<i>After approval</i>
☐	Trip Leader – Track income, expenses, and refund deadlines throughout planning period	<i>Ongoing</i>
PHASE 3 — COURSE CREDIT APPROVAL (Academic Trips Only)		
	Role – Task / Action	Deadline
☐	Trip Leader – Complete Curriculum Application/Checklist; Attach syllabi and itinerary	<i>See “Course Credit” deadlines in table above</i>
☐	Trip Leader – Obtain Dean designee signature; email checklist, itinerary, and syllabi to academicrecords@andrews.edu ; and be sure to upload syllabi to Learning Hub	<i>With application</i>
☐	Trip Leader – Verify courses, fees & pre/post-trip dates in the Course Schedule system	<i>Before registration</i>
☐	Trip Leader – Ensure students register for correct course section(s), once opened	<i>Ongoing</i>

PHASE 5 — PARTICIPANT CLEARANCE		
	Role – Task / Action	Deadline
☐	Trip Leader – Collect Student/Non-Student Participant Agreement Forms from all participants	<i>Before non-refundable deposits</i>
☐	Trip Leader – Hold orientation meeting with participants (outline pre/post-trip expectations); ensure Student Financial Services representative is present to discuss financial clearance	<i>As set by Trip Leader</i>
☐	Trip Leader – Facilitate deposit payments for all participants	<i>Per deposit schedule</i>
☐	Trip Leader – Monitor student course registration; confirm financial clearance for all participants	<i>≥1 month before departure</i>
PHASE 6 — RISK MANAGEMENT		
	Role – Task / Action	Deadline
All Trips — Domestic & International		
☐	Trip Leader – Contact Risk Management (Loretta) to schedule required meeting	<i>In advance of departure</i>
☐	Trip Leader – Submit Safety Planning Sheet & approved Itinerary to Risk Management	<i>7 working days prior to departure</i>
☐	Trip Leader – Ensure Hold Harmless Agreement completed by all participants; submit Participant List to Risk Management	<i>Up to the day of departure</i>
☐	Trip Leader – Meet with Risk Management — confirm all documents reviewed	<i>Up to the day of departure</i>
International Trips — Additional Requirements		
☐	Trip Leader – Obtain Short-Term Travel Insurance for all participants	<i>7 working days prior to departure</i>
☐	Trip Leader – Review U.S. State Dept. travel warning level: Level 4 = STOP; Level 3 = CAO/CFO approval; Level 1–2 = Proceed	<i>Up to night before departure</i>
PHASE 7 — EXECUTION		
	Role – Task / Action	Deadline
☐	Trip Leader – Lead trip per approved itinerary; serve as primary point of contact for all issues & emergencies	<i>During trip</i>
☐	Trip Leader – Monitor and document all income and expenses in real time	<i>During trip</i>
☐	Trip Leader – Document any incidents, deviations, or noteworthy events for Wrap Up report	<i>During trip</i>
PHASE 8 — WRAP UP		
	Role – Task / Action	Deadline
☐	Trip Leader – Reconcile all income & expenses (Chrome River, transfers, etc.); generate Final Trip Summary for Dean/VP	<i>Within 30 days</i>
☐	Trip Leader – Submit expense reconciliation to Dean/VP; Dean/VP forwards to VP Finance — confirm submission	<i>Within 30 days</i>
☐	Trip Leader – Trip leader notifies Financial Records to release deposit and authorize transfers of overnight trip fees	<i>Within 30 days</i>
☐	Trip Leader – Complete Trip Leader Post-Trip Survey; Collect Participant Post-Trip Surveys	<i>Within 30 days</i>

Academic trips only: Phase 3 (Course Credit Approval) applies exclusively to trips carrying course credit.
International trips only: Travel Insurance and State Dept. warning review required in Phase 6.