

**Western Connecticut State University  
Student Activities Travel  
Planning Packet and Checklist  
For Clubs**

Meeting Date: \_\_\_\_\_

Forms Submitted: \_\_\_\_\_

*For Office Use Only  
Rev. 12/23/16*

The packet below is designed for Student Organization Travel  
and is only possible when the proper deadlines are followed.

**Club Information**

Student Club: \_\_\_\_\_

Name of Conference/Trip Destination: \_\_\_\_\_

Date(s) of Travel: \_\_\_\_\_ through \_\_\_\_\_

Number Traveling (including Advisor): \_\_\_\_\_

Student Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_@connect.wcsu.edu

Advisor Name: \_\_\_\_\_ Banner ID #: \_\_\_\_\_

Office Address: \_\_\_\_\_ Email: \_\_\_\_\_@wcsu.edu

Phone: \_\_\_\_\_ Cell Phone (for contact during trip): \_\_\_\_\_

**If policies and procedures are not followed, travel requests will be denied.**

**I hereby recognize that if the tasks/items needed for club travel are not completed by the deadline noted in this packet on page 13 and the proper documentation is not submitted to The Center for Student Involvement by said deadline, the trip will NOT occur. I also recognize that the deadlines noted in this packet are put into place for a reason. I will adhere to them for the sake of those students participating in the trip.**

**Travel Request Worksheet Packet due by \_\_\_\_\_**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Advisor Signature

\_\_\_\_\_  
Date

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# Planning Responsibilities

## **CLUB RESPONSIBILITIES**

- **Meet with The Center for Student Involvement staff and advisor/chaperone to plan trip at least twelve (12) weeks prior to any deadlines needed for travel. (Required)**
- Find hotel, get price quote.
- Find transportation and get price quotes of airfare/rail/bus.
- Communicate with any other vendor being used (tickets, conference registration, etc.).
- Submit all price quotes and trip information the Student Government for funding.
- Confirm that an advisor/university staff is accompanying the students on the trip as indicated in this policy.
- Confirm advisor/university staff travel plans to be sure that advisor/university staff is traveling with the club to destination. If advisor/university staff's travel plans are different than the club's plans, please notify The Center for Student Involvement staff as soon as possible.
- Set trip agenda.
- Complete the Field Trip Request Worksheet (Day Trips) or the Overnight Travel Request Worksheet, with all support materials and submit to The Center for Student Involvement.
- (Advisors) Sign the Travel Authorization.
- Provide The Center for Student Involvement with a list of the names and Student ID # as well as Student Travel Waiver form of all students who plan on attending with the proper Travel Request forms and documentation.
- Plan and attend a Travel Orientation meeting with advisor traveling on the trip two (2) to three (3) weeks before the trip.
- Call the hotel, bus company, and any other vendors to confirm reservations.

## **ADVISOR/CHAPERONE RESPONSIBILITIES**

- **Meet with The Center for Student Involvement staff and club members to plan trip at least twelve (12) weeks prior to any deadlines needed for travel. (Required)**
- Follow up with students/club to ensure they are making arrangements in a timely manner.
- Confirm with club of your travel plans to be sure that you are traveling with the club to destination. If your travel plans are different than the club's plans, please notify The Center for Student Involvement staff as soon as possible.
- Sign appropriate travel forms.
- Make sure you have signed Travel Authorization Form.
- Provide your contact information to The Center for Student Involvement which will be forwarded to University Police for contact purposes during the trip.
- Notify students if they are not eligible for club travel The Center for Student Involvement will check eligibility).
- Plan and attend the Travel Orientation Meeting with the student club members two (2) to three (3) weeks before the trip.
- Check-in students before they get on the bus; make sure the "right" students are getting on the bus (i.e., no one who didn't complete forms, etc.).
- Keep a copy of Student Travel Packet forms of all students and Emergency Procedures (Appendix v) with you throughout the trip.
- Obtain all proper receipts throughout the trip.
- Return the receipts to the travel office as soon as possible in order to receive your reimbursement.

# Policies and Procedures

**PLEASE NOTE: Travel at WCSU is regulated by the WCSU Travel Policies outlined in the WCSU Travel Manual which can be found at [wcsu.edu/travel](http://wcsu.edu/travel).**

## **TYPE OF TRAVEL**

### **In-State and Out-Of-State (Domestic)**

Different policies and guidelines may apply to the trip based on whether the destination is in-state or out-of-state/international. The use of a chartered bus/airfare may be required for long distance trips. In addition, out-of-state travel may require longer planning periods, additional approvals, additional chaperones, etc. **In order for club funds, university vehicles, or other university resources to be used for the trip, an advisor or WCSU faculty/staff member must be present for the trip and the Travel Request form and Travel Authorization must be completed.**

### **International**

It is advised that any club planning an international trip add another ten (10) to twelve (12) weeks to the already established twelve (12) week travel process. **Before any planning takes place, a meeting with The Center for Student Involvement is necessary at least six (6) months prior to any deadlines associated with any travel** in order to ensure the paperwork is processed in a timely manner.

Travel Tips- A fantastic resource to those traveling internationally is the United States Department of State's website [travel.state.gov](http://travel.state.gov). This website has links to international travel information:

- Travel warnings and alerts to U.S. citizens
- Smart Traveler Enrollment Program (passport registration and smart phone apps)
- Instructions for the passport application and utilization process with forms and renewal information as well as passport replacement instructions
- Information regarding visas
- Tips for traveling abroad

Health Notes- It is required that the club look at the Center for Disease Control (CDC) website at [www.cdc.gov/travel](http://www.cdc.gov/travel) for information regarding immunizations and vaccinations that may be required before you travel abroad as well as any Traveler Notices regarding any outbreaks in certain countries. Another health resource for is the Travel Medicine Program in the Occupational Health Services Department of Danbury Hospital. Their staff provides vaccinations and consultations to both individuals and employees of companies or organizations traveling abroad. For more information, please contact the Coordinator of International Student Services.

When traveling abroad, International Emergency Health Insurance is required for all those traveling. This is available through the University at a minimal cost and is an expense covered in part by the Student Government Association. When you travel, you will be supplied with an insurance card which you can use in the case of a health emergency.

Travel Paperwork- When traveling abroad, a passport is required. It is recommended that you should have your passport application completed and submitted at least three (3) months prior to travel. It is also recommended that copies of your passport be made and kept in a safe place, separate from where you keep your passport. **International students** should consult with the International Services Office and/or the office of the Assistant Dean of Students when participating in club sponsored trips that will take them outside the United States.

## **PLANNING FOR THE TRIP- EARLIER IS BETTER!**

The club advisor/chaperone and the club representatives working on the trip (ex. Club president, committee chair, etc.) must meet with The Center for Student Involvement **twelve (12) weeks before any deadlines associated with any travel** in order to ensure the paperwork is process in a timely manner.

**PLEASE understand that the process to plan a trip may take up to a MINIMUM of twelve (12) weeks.** It is very important to plan ahead for a trip that requires an overnight stay or bus travel. When planning an international trip, clubs will need to add another ten (10) to twelve (12) weeks to the travel process.

**PLEASE NOTE: These deadlines/time frames are based on a semester timetable. These deadlines may need to increase if travel planning occurs during winter or summer breaks.**

## **STUDENT ELIGIBILITY**

Students attending the trip must be currently registered matriculated student at Western Connecticut State University. Non-students, non-matriculated students and/or non-WCSU faculty/staff may not use club/university funds or ride in university vehicles to travel. Non-students, non-matriculated students and non-WCSU faculty/staff may travel with the group as long as the individual pays the full amount of travel costs; they are NOT covered under WCSU insurance during the trip.

**International students** should consult with the International Services Office when participating in club sponsored trips that will take them outside the United States. There are more processes involved to insure that the international student has all the proper visas and paperwork to enter the destination country and return to the United States.

## **FINANCING THE TRIP**

Clubs are expected to fund their own travel, or request funds from Student Government Association (SGA). Clubs can use money from their 815/fundraising club account that they have earned through fundraising or donations, or charge the individuals traveling. Any funds that are earned or collected must be deposited in the club 815/fundraising account before use. In order for club money to be used for a trip, Advisors or a designee approved by The Center for Student Involvement must be present at the trip. Please consult with the SGA Vice President of Finance for the budget cycle calendar and process. Club officers should consult with the Student Organization Training (on the [www.wcsu.edu/studentlife](http://www.wcsu.edu/studentlife) page) for the SGA Budget Request Form instructions.

## **BEHAVIOR**

Students are expected to conduct themselves as representatives of the university when using university funds to travel. Students must sign an Assumption of Risk and Responsibility form before traveling. Students traveling need to know that the University's Code of Conduct follows them wherever they travel. Students that are found violating the Code of Conduct while traveling on a University sponsored trip will be subject to the University's judicial process and may have to repay the University for the expense of the trip. A copy of the Code of Conduct can be found at [www.wcsu.edu/stuaffairs](http://www.wcsu.edu/stuaffairs) and click the link to Judicial Affairs on the left side of the screen.

# STUDENT TRAVEL FORMS

## Overnight Travel Request Worksheet

This worksheet contains all the information that is needed for CSI to complete the official Travel Authorization (as explained below). Please remember that the expense totals on this worksheet is calculated for the entire group traveling and not the total cost per individual.

## Travel Authorization

The information from the Field Trip Request Worksheet/ Overnight Travel Request Worksheet gets transferred onto the Travel Authorization. This is the official form used to approve the travel requested by the club. Once the Student Organization Fiscal Assistant has completed the Travel Authorization, this form will need to be signed by the advisor. Other signatures needed are the Student Activity Fee Manager, the Vice President of Student Affairs, and in the case of international travel, the University President. Once this form is completed and fully authorized, purchasing and booking can officially begin. *Any booking that occurs prior to the authorization of the form is not guaranteed to be reimbursed by the university.*

## Trip Ticket Request Form (Appendix i)

The Trip Ticket Request Form is the form used when students are being charged for a trip. This must be filled out and submitted with the Field Trip Request Worksheet/ Overnight Travel Request Worksheet. You must use the WCSU Box Office if you are charging students admission/fees in order to register for the trip. These funds will be placed in your **fundraising account** to help pay for the trip. This form is available at [www.wcsu.edu/studentlife](http://www.wcsu.edu/studentlife). This form must be filled out online and printed.

**NOTE: Before submitting any travel paperwork to the Center for Student Involvement, all trip participants must purchase their ticket at the box office. Once all the participants have purchased their tickets for the trip, the club can submit all the paperwork for the trip.**

## Student Travel Waiver

All students traveling on a university sponsored trip are required to complete a Student Travel Waiver. The waiver contains the following items:

- Emergency Contact & Health Information Form (Appendix ii)
- Statement of Due Warning, Assumption of Risk and Responsibility Form (Appendix iii)

For club travel, the Student Travel Waiver form needs to be received by The Center for Student Involvement NO LATER than two (2) WEEKS prior to the trip. The Center for Student Involvement will leave the forms with University Police during the duration of the trip. The advisor also needs to retain a copy of these forms to have available in the event of an emergency during the trip (this will be provided by the CSI Office.)

If the Box Office is being used for admission, the Box Office will compile a list of all students attending, their student ID number, and the completed Student Travel Packet forms. If the Box Office is not being used, the club is responsible for distributing the Student Travel Waiver form to all students that are traveling. This form is available in The Center for Student Involvement or online at [www.wcsu.edu/studentlife](http://www.wcsu.edu/studentlife). The club is responsible for making enough copies for all students.

# TRANSPORTATION

## Air

It is recommended that out-of-state or international air travel be arranged through a State of Connecticut approved travel agency. It is also **required** that the individuals travel together on the same flight with advisors/chaperones, rather than meeting at the destination.

### **How Are You Booking Your Air?**

#### University Books Air

- a. If the University is booking your airline tickets, research your flight and please indicate which airport you would like to depart (Bradley, LaGuardia, JFK, White Plains, etc.) and your preferred flight. This can be done by searching flights online.
- b. Pick several flights as your first choice may be sold out at the time the university books your airline tickets. Label each flight with 1<sup>st</sup> Choice, 2<sup>nd</sup> Choice, etc. Print this information out and submit it with your Overnight Travel Request Worksheet.
- c. Typically, a service fee is charged per ticket when the university books airline tickets through the travel agency used by the University (This cost will vary. The Center for Student Involvement will give the club the service fee amount.). Please budget accordingly.
- d. Most airlines charge baggage fees of \$20-\$25 each way. Please budget accordingly.
- e. When booking airline tickets through the University, it is extremely important that the following information is furnished either by the Box Office or the club:
  - i. Each student's full name as it appears on a drivers license, passport or government issued ID
  - ii. Each student's date of birth
  - iii. Student ID number
  - iv. Gender

#### Individuals Book Air

- a. If you choose to book your own flight, you may do so and get reimbursed as long as you provide the proper receipts showing you purchased the airfare. Note: You cannot be reimbursed until after you return from your trip...plan accordingly. If you choose to purchase your airline ticket, you will not get reimbursed if a Travel Authorization is not approved prior to your trip.
- b. When booking your airfare, you may be tempted to book an air+hotel+car package. Please refrain from this as the university cannot reimburse you for such packages. If you have any questions about this subject, please contact The Center for Student Involvement.

### **How Are Traveling Once You Arrive At Your Destination?**

Often, student groups forget that once one arrives at the destination, there is likely a need to get from the airport/train station to the final destination. Taxis, shuttles and car rentals are permitted. These expenses are reimbursable and the university cannot prepay any of these expenses. **DO NOT FORGET TO GET A RECIEPT!!!**



## **Rail/Train**

Several methods of rail travel are available to clubs. Again, it is also **required** that the individuals travel together on the same train with advisors/chaperones, rather than meeting at the destination.

### **University Books Amtrak**

The University has the capability to pay for Amtrak tickets in advance.

- a. Find the most compatible train that suits your needs. Look for price, departure point, time/schedule and day of the week. You will need this information in order for the university to book the train tickets you need.
- b. If the University is booking your train tickets, please indicate which train station you would like to depart and your preferred train departure. This can be done by searching trains online. Pick several trains as your first pick may be sold out at the time the university books your airline ticket. Print this information out and submit it with your Travel Request Form.
- c. When booking train tickets through the University, it is extremely important that the following information is furnished:
  - i. Each student's full name as it appears on a drivers license, passport or government issued ID
  - ii. Each student's date of birth
  - iii. Student ID number
  - iv. Gender

### **Individuals Book Amtrak**

The easiest way to purchase tickets is to have an individual(s) pay for the tickets prior to departure and submit the receipts after the trip is concluded. A check is issued to an individual (in most cases, the club's advisor) and it is up to that individual to issue reimbursements to other individuals that purchased tickets.

Note: the individual collecting reimbursements must keep a track through a listing of those that purchased tickets and the amount owed for reimbursement.

### **Metro North**

When traveling by Metro North train, the easiest way to purchase tickets is to have an individual(s) pay for the tickets prior to departure and submit the receipts after the trip is concluded. A check is issued to an individual (in most cases, the club's advisor) and it is up to that individual to issue reimbursements to other individuals that purchased tickets.

Note: the individual collecting reimbursements must keep a track through a listing of those that purchased tickets and the amount owed for reimbursement.

### **Rental Car/Vehicle**

In general, all rental vehicles should be booked through the current State Contract Vendors (currently Enterprise Rental Car). The request must be justified in writing and will be considered if public transportation is unavailable or if automobile rental results in a cost savings, which must be documented by the traveler and included as part of the justification. Request for automobile rental must be made on a Policy Exception Form attached to the Travel Authorization form as noted in the WCSU Travel Manual.

## Car

Carpooling/Student driven vehicles: Students may drive personal vehicles to events with prior approval. Students are still required to complete a Travel Request Form. It is recommended that individuals caravan if driving themselves.

-If you wish to be reimbursed for any mileage:

- a. You will need to chart your course using MapQuest (MapQuest is the only online mapping service the university accepts for mileage reimbursement)
- b. You will need to provide the declaration page of your auto insurance (not the insurance card) in order to be reimbursed for mileage. (This must be on file at the time of travel)
  - a. The minimum coverage must be listed and needs to meet the guidelines of; Bodily Injury Liability: \$50,000/\$100,000 and Property Damage: \$5,000
  - b. Your name must be listed.
  - c. Your dates of coverage must be listed.
- c. Gas expenses are not reimbursable. Only a per mile rate (determined by the Internal Revenue Service as outlined in the WCSU Travel Manual) is reimbursable.

## University Vans

University Vans may only be driven by WCSU faculty/staff who been approved to drive university vehicles. University vans are recommended for local travel and may not be approved for travel with mileage over 400 miles round trip. Club advisors can reserve the vehicles online through the WCSU maintenance request system (Schooldude) website on a first come-first serve basis. Students are not permitted to drive any university vehicle. For more information, please contact Janet Blanchette in Environmental & Facilities Services.

## Bus Transportation:

For large groups or for out-of-state travel you will need to obtain quotes from bus companies to find the best price for busses. You may contact the Center for Student Involvement or the Purchasing Office for bus company contact information. The fees for the busses will be reflected on a Purchase Order and not the Travel Authorization.

-Research prices for bus transportation

-Get a copy of the quote.

-Fax/Email trip itinerary to bus company to make sure they can accommodate your requests.

-Ask if departure time effects cost

-Ask about cancellation policies

-Ask if multiple locations effect cost

-Ask if you are required to pay for a hotel room for the driver

-Ask if they require a deposit, and when it is due

-Please ask for information regarding the bus company's cancellation policy. PLEASE

NOTE: If, for any reason, you must cancel your bus, please do so in a timely manner. In some instances, there will be a cancelation fee.

## LODGING

**-It is the responsibility of the group to make the hotel reservations.** Most hotels will likely require that a club advisor or member use his/her credit card to hold the rooms. Most likely, the card will not be charged, but ASK if a deposit will be placed on the card when you make the reservation.

**-Room and tax costs are covered by the University.** Any incidental costs associated with the hotel stay (room service, movies and other miscellaneous charges) are the responsibility of the individual staying in the room.

**-It is recommended that males and females not share hotel rooms. Advisors cannot share rooms with students** without prior approval. Approval will be given when the Travel Request Worksheet and supporting documents are reviewed by the administration. Please check with The Center for Student Involvement for assistance with other lodging options such as university dorm rooms or student hostels.

**-Advisors MUST stay in the same hotel as the students.**

**-The conference rate listed in the conference information is the rate that is allowed to be reimbursed.** If traveling for a conference, conference hotel rate information may be included in the conference registration. Any rate higher than the conference rate cannot be reimbursed. Therefore, if there is a conference rate listed, the group should be staying at the conference location. If for some reason the group needs to stay in an alternate location, they may still only be reimbursed based on the conference rate. For example, if a conference rate is listed at \$159.00/night and the group stays at a hotel for \$175.00/night, the reimbursement will only be for \$159.00/night. It is the responsibility of the club to ensure there are obtaining the conference rate. As well, if there is a conference rate, this is the rate that should be used when submitting budgets to SGA.

### Individual Pays for Accommodations

-If you choose to pay with your credit card for the entire bill, you must get a complete receipt showing a balance due of \$0 in order to get reimbursed. This selection is the preferred way of payment for lodging. The individual can receive an advance check approximately three (3) days prior to the trip in order to help pay for the lodging. Note: You cannot be reimbursed until after you return from your trip...plan accordingly.

### University Pays for Accommodations

- a. Before making a reservation, ask if the hotel accepts checks:
  1. at CHECK IN. If they do not accept Checks at CHECK-IN then
  2. Ask if they will accept a mailed check and when the hotel would need to receive the check in order to check in.
  3. If they do not accept Checks at all, Contact the Student Life/Student Activities Office.
- b. Make the reservation. A credit card will be needed to secure the reservation. Most likely, the card will not be charged, but ASK if a deposit will be placed on the card when you make the reservation.
- c. If checks are accepted (regardless of when) ask for an INVOICE for the stay. This needs to be IN WRITING. A confirmation or estimate is not acceptable.
- d. A W-9 (*Appendix v*) will be needed in order to cut a check.
- e. If a check is requested and needs to be mailed the Travel Office will notify the Advisor/Designee that the check is available to pick up in the Travel Office. If the check is being taken with you on the trip for presentation during check in, the Travel Office will give it to the Advisor/Designee prior to the group leaving for the trip.

## CONFERENCE REGISTRATION

### If Registration for a Conference Is Needed For The Trip:

It is important that conference information showing the dates of the conference and any costs associated with the trip, such as registration fee, lodging rates, meals that may be included, etc, be included with the Overnight Travel Request Worksheet.

#### University Pays for Conference Registration

-If you wish the university to cut a check for conference registration:

- a. Make a photo copy of the registration form.
- b. A W-9 (*Appendix iv*) from the organization running the conference will be needed to be submitted with the Field Trip Request Worksheet/ Overnight Travel Request Worksheet in order to cut a check. If your club has attended the conference in the past, the W9 may already be on file with the University. Please verify this information with The Center for Student Involvement.
- c. The Travel Office will notify you via e-mail when the check is ready. Pick it up, complete a hard copy of the registration, and mail it with the check.

#### Individual Pays for Conference Registration

-If you wish to do the conference registration online with your credit card, you will need to print out the receipt showing your name and a \$0.00 balance at the end of the registration process.

Note: You cannot be reimbursed until after the conference is over...plan accordingly.

## OTHER IMPORTANT STEPS

### Charging Students for the Trip

The box office **MUST** be used in order to charge any participant for any trips/travel.

- a. The Trip Ticket Request form can be submitted before the in order to have the participants purchase their trip tickets prior to submitting the Field Trip Request Worksheet/ Overnight Travel Request Worksheet and supporting materials. **NOTE: Before submitting any travel paperwork to the Center for Student Involvement, all trip participants must purchase their ticket at the box office. Once all the participants have purchased their tickets for the trip, the club can submit all the paperwork for the trip.**
- b. Students will fill out the Travel Waiver when they pay for the trip at the box office.
- c. It is important to note that the University Box Office accepts Cash, Connect Cash and Credit Cards and does not accept Checks as a form of payment. **HOWEVER, if participants pay via credit card, the club will be assessed for the transaction rate of 4%.** Keep in this in mind when deciding on a ticket price for your trip. We strongly recommend that the students put funds on their WCSU ID and use that to pay their admission. The club will NOT be charged the 4% credit card fee.
- d. Be aware, the club will be charged a \$0.25/ticket fee.
- e. **STUDENTS ARE NOT PURCHASING AIRFARE, TRANSPORTATION TICKETS OR DIRECT ADMISSION TICKETS FOR THE EVENT AT THE WCSU BOX OFFICE.**

The Box Office will compile a list of all students attending, their student ID number, and the complete Student Travel Packet forms. If the Box office is not being used, pass out Student Travel Packet forms to all students attending trip. These forms are available in The Center for Student Involvement or online at [www.wcsu.edu/studentlife](http://www.wcsu.edu/studentlife) and the club is responsible for making enough copies for all students.

## TRAVEL ORIENTATION

If the trip includes at least one overnight stay, it is **required** that the club and advisor have a travel orientation meeting at least two (2) weeks before the trip with all the participants traveling. It may also be necessary to have more than one of these travel orientation meetings. This orientation needs to include but is not limited to the following:

- Ensuring all students attending trip have completed a Student Travel Packet forms
- Ensure all students attending the trip have important information such as
  - Meeting/departure time
  - Agenda/itinerary
  - Any personal money needed
  - Contact information for chaperones and the hotel
  - Packing (what to pack or what not to pack)
- Discuss the code of conduct and the University's expectation of those traveling.
- Discuss any issues concerning the destination including
  - Safety and emergency information
  - Lodging
  - Common sense thinking when traveling
  
- If traveling **internationally** you will need to cover many more topics such as:
  - Visas, passports and any paperwork associated needed for international travel
  - Cultural Sensitivity/Culture Shock
  - **Health Insurance/vaccines**
  - Currency
  - Food (what to eat/what to stay away from)
  - Being an American in another country
  - Please consult the websites [travel.state.gov](http://travel.state.gov) and [www.cdc.gov/travel](http://www.cdc.gov/travel) as well as the Coordinator of International Student Services for assistance when gathering international travel information for the Travel Orientation meeting

Examples of the Travel Orientation Agenda template(s) are included in this packet (Appendix vii and viii) and are also available for use online at [www.wcsu.edu/studentlife](http://www.wcsu.edu/studentlife).

It is recommended that the trip organizer include other handouts with the Travel Orientation Agenda template such as maps (street and transportation maps) and itineraries/schedules (departure, arrival, activities, meetings, etc) as well as any other pertinent information.

A copy of the Code of Conduct can be found at [www.wcsu.edu/stuaffairs](http://www.wcsu.edu/stuaffairs) and click the link to Judicial Affairs on the left side of the screen.

# WCSU STUDENT ACTIVITY FEE OVERNIGHT TRAVEL REQUEST WORKSHEET

Student Contact Name:	Club Affiliation:	Phone:												
Advisor Name (if applicable):	Phone:	WCSU Email:												
	WCSU Email:	Advisor Banner ID:												
<b>Itinerary – Travel most always starts from WCSU and end at WCSU</b>														
Travel From:	Depart on (date)	at (time)												
Travel To:	Return on (date)	at (time)												
<b>Purpose of Travel: (Attach Conference Information/Minutes Approving Travel Expenditures/Any Receipts)</b>														
<b>Number of Students Traveling:</b>														
Are you flying out of Bradley Airport? <input type="checkbox"/> Yes <input type="checkbox"/> No														
If yes, Parking Permit required from travel office.														
Is the University pre-paying the registration fee? <input type="checkbox"/> Yes <input type="checkbox"/> No														
If yes, the vendor FEIN is mandatory: FEIN # _____ (attach W9 if applicable)														
Is the University pre-paying the hotel fee? <input type="checkbox"/> Yes <input type="checkbox"/> No														
If yes, the hotel FEIN is mandatory: FEIN # _____ (attach W9 if applicable)														
Is a travel advance being requested? <input type="checkbox"/> Yes <input type="checkbox"/> No (If YES up to 80% of the unpaid balance can be requested)														
<p><b>Lodging:</b> Please make every effort to obtain lowest cost possible (If you are attending a conference, make every attempt to stay in the advertised/recommended hotel.)</p> <p># of Nights                      \$ _____</p> <p>Cost per night                      \$ _____</p> <p>Tax per night                      \$ _____</p> <p># of Rooms                      _____</p> <p>Total Cost                      \$ _____</p> <p style="text-align: center; font-size: small;">(Transfer lodging cost to lodging line on right)</p>	<p><b>Total Cost (Itemize)</b></p> <p>Airfare/Rail fare                      \$ _____</p> <p>Baggage Fee                      \$ _____</p> <p>Registration Fee                      \$ _____</p> <p>Rental Car                      \$ _____</p> <p>Taxi/Limo                      \$ _____</p> <p>Parking/Tolls                      \$ _____</p> <p>Lodging                      \$ _____</p> <p>Mileage                      \$ _____</p> <p>Other _____                      \$ _____</p> <p>_____                      \$ _____</p> <p style="text-align: right; margin-top: 10px;">Total Cost \$ _____</p>													
<p><b>Mileage:</b> Insurance declaration page required for reimbursement</p> <p>How many miles _____ X _____ cents a mile</p> <p>Total Mileage \$ _____ per car</p> <p style="text-align: center; font-size: small;">(Transfer mileage cost to mileage line on right)</p>	<table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 25%;">FUND</th> <th style="width: 25%;">ACCOUNT</th> <th style="width: 50%;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td>816</td> <td>303</td> <td>\$ _____</td> </tr> <tr> <td>815</td> <td>303</td> <td>\$ _____</td> </tr> <tr> <td>Advisor AUP/Dept.</td> <td></td> <td>\$ _____</td> </tr> </tbody> </table>		FUND	ACCOUNT	AMOUNT	816	303	\$ _____	815	303	\$ _____	Advisor AUP/Dept.		\$ _____
FUND	ACCOUNT	AMOUNT												
816	303	\$ _____												
815	303	\$ _____												
Advisor AUP/Dept.		\$ _____												
<p>Total approved by SGA: \$ _____</p> <p style="font-size: small;">(Located on SGA Budget Sheet)</p> <p><b>(Box Office Ticket Sales proceeds go to Fundraising Account)</b></p> <p>Ticket Price (per person): \$ _____</p> <p>Total from Ticket Sales: \$ _____</p> <p>Amount from fundraising \$ _____</p>	<p style="text-align: right; font-size: small;">Form Revised 12/2016</p>													

## DEADLINES

**PLEASE NOTE:** If the items **BELOW** are not submitted *in total, hard copy, by the deadline* noted, the trip will **NOT** be able to occur. The deadlines are put into place for a reason. **Please adhere to them for the sake of those students participating in the trip.**

When submitting the items required from the checklist below, keep in mind:

- Hard copies must be titled based on their checklist item (ex. "Conference Registration Materials")
- Flight information should be labeled by, 1<sup>st</sup> choice, 2<sup>nd</sup> choice, 3<sup>rd</sup> choice

Today's date \_\_\_\_\_

Travel Request Worksheet by \_\_\_\_\_ to include the following:

- \_\_\_\_\_ Minutes from the meeting approving the expenses for the trip \*(from 815 & 816)\*
- \_\_\_\_\_ Completed Overnight Travel Request Worksheet
- \_\_\_\_\_ Confirm if the club's Advisor is receiving funding from other departments/orgs
- \_\_\_\_\_ Trip Ticket Request Form
- \_\_\_\_\_ Conference information including (but not limited to):
  - Dates of Conference
  - Location of Conference
  - Registration Fee (highlight the appropriate fees) and/or Registration Form
  - Lodging Rates
- \_\_\_\_\_ Invoice for lodging to include all taxes
- \_\_\_\_\_ W9 for Hotel
- \_\_\_\_\_ Invoice for tickets for event/museum
- \_\_\_\_\_ W-9 for conference fees/tickets for event
- \_\_\_\_\_ A copy of preferred airlines/trains, airports/train stations and departures for travel agent booking tickets
- \_\_\_\_\_ List of names as they appear on an official ID (add birthdates & gender for air travel)
  - Club Furnishes  Box Office Furnishes
- \_\_\_\_\_ Student Travel Waiver (Assumption of Risk/Emergency Contact Form)
  - Club Furnishes  Box Office Furnishes
- \_\_\_\_\_ MapQuest with mileage
- \_\_\_\_\_ Auto insurance declaration page (if being reimbursed for mileage)
- \_\_\_\_\_ Copy of rental car confirmation
- \_\_\_\_\_ \_\_\_\_\_

Travel Orientation done on or before \_\_\_\_\_

## **Contact Information**

**Dennis Leszko**- Director  
The Center for Student Involvement- SC 227  
leszkod@wcsu.edu  
203-837-8214

**Cathy Kost**- Student Organization Fiscal Assistant  
The Center for Student Involvement- SC 227  
kostc@wcsu.edu  
203-837-

**Kim Spinelli**- Administrative Assistant  
Travel Office-Fiscal Affairs- UH-206  
spinellik@wcsu.edu  
203-837-8505

**Sharon Guck**- Coordinator of Substance Abuse Prevention Programs  
CHOICES Office- SC 211  
gucks@wcsu.edu  
203-837-8899

**Janet Blanchette**- Environmental & Facilities Services  
University Hall 003  
blanchettej@wcsu.edu  
203-837-9309



# Appendix i

## TICKET REQUEST FORM

STUDENT ORGANIZATION - TRIP



### (A) Event Information:

Name of Event:

Trip Leaves Day: \_\_\_\_\_ Time \_\_\_\_\_

Trip Returns Day: \_\_\_\_\_ Time \_\_\_\_\_

Trip will depart from: Midtown Westside Off-Campus

Campus Pickup Location:

Maximum number of tickets available (including comps):

Name(s) for comp tickets

Date Tickets Go on Sale: \_\_\_\_\_ @ 10:00am

### (B) Organization:

Name:

Contact:

Phone:

Email: \_\_\_\_\_@connect.wcsu.edu

Settlement Information:

Fund 815 816 Account Number

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### (C) Ticket Information

Buyer Types and Cost per Ticket

(Please meet with a member of the Box Office Staff if you need other buyer types)

WCSU Student

WCSU Employee

General Admission

### (D) Ticket Details:

The following information will print on the ticket:

Name of the Event

Pick up Information

Cost of Ticket

Start Date

Departure Time

Additional Information to Appear on the Ticket (1 line - max 30 characters)

### (G) Required Signatures:

I understand that the following will be deducted from final settlement: \$15 per ticket fees and credit card fees. I certify that as an agent for the organization indicated in SB, I am authorized to make this request.

This form is available at [wcsu.edu/studentlife](http://wcsu.edu/studentlife).  
Please fill out this form online and print it out.

Student Activities Fiscal Assistant

#### For Box Office Use Only

Date Processed \_\_\_\_/\_\_\_\_/\_\_\_\_ Event Code: \_\_\_\_\_

Performance Code: \_\_\_\_\_ Processed By: \_\_\_\_\_

# Appendix ii

## WESTERN CONNECTICUT STATE UNIVERSITY TRAVEL WAIVER FORM

### STATEMENT OF DUE WARNING, ASSUMPTION OF RISK AND RESPONSIBILITY

The following should be read and completed by each student traveling on a sponsored trip:

I \_\_\_\_\_ voluntarily agree to participate in the following:  
(print name)

Name of Trip/Destination: \_\_\_\_\_

Date(s) of Trip: \_\_\_\_\_

I am aware that this is a Western Connecticut State University sponsored trip and that the University's Code of Conduct Alcohol Policies and Travel Policies travel with me. I am held to the same standards of conduct as if I was on campus. If I am found violating the Code of Conduct while traveling, I will be subject to the University's judicial process and may have to repay the University for the expenses of the trip.

I am aware of the inherent and/or latent danger (including but not limited to: risk of serious injury, the hazards of travel, accident or illness, or acts of God) of participating in such activity.

I am further aware and have been advised that the University and/or its personnel will provide minimal or no supervision during this activity. The following regulations will apply:

1. No minors, without parental or guardian permission.
2. No alcohol permitted on bus or mode of transportation as well as in housing. Additionally, no alcohol may be purchased by, consumed by or distributed to persons under the legal drinking age as dictated by laws of the location of the program and further governed by the University Alcohol Policy, Student Code of Conduct and WCSU Travel Policy.
3. It is the traveler's sole responsibility to strictly adhere to the departure schedule stated prior to trip commencement. Western Connecticut State University will not be responsible for those travelers who fail to comply with this regulation.
4. Western Connecticut State University assumes no responsibility for traveler's personal property and reserves the right to inspect any/or all packages brought on board the vehicle of transportation.

Failure to comply with any/or all of the regulations stated above will result in the termination of the traveler's trip, as well as the forfeiture of all monies paid to date. It may also result in disciplinary action.

Knowing all this, I assume all risks that may arise from or in connection with this activity. In addition, I do hereby agree and warrant to release and hold harmless the state of Connecticut, the Board of Regents of the Connecticut State Colleges and Universities and/or Western Connecticut State University, its agents and employees, from any and all liability, claims, demands, actions and causes of action whatsoever, arising out of or related to any loss damage or injury resulting from my participation in this activity.

Being eighteen (18) years of age, I am eligible to participate in this activity.

Student's Signature (or Parent's Signature) \_\_\_\_\_

Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

Student ID Number: \_\_\_\_\_ Phone #: \_\_\_\_\_

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# Appendix iii

## EMERGENCY CONTACT & HEALTH INFORMATION

1. Print Student's Name (as it appears exactly on your license, government issued ID or passport):

Last: \_\_\_\_\_ First: \_\_\_\_\_ Middle: \_\_\_\_\_

Date of Birth (mm/dd/yyyy): \_\_\_\_\_ WCSU ID#: \_\_\_\_\_

Circle one:      Male                  Female

2. In case of emergency, who should we notify?

Primary Emergency Contact:

Secondary Emergency Contact:

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Telephone (    ) \_\_\_\_\_

Home Telephone (    ) \_\_\_\_\_

Work Telephone (    ) \_\_\_\_\_

Work Telephone (    ) \_\_\_\_\_

Cell Phone (    ) \_\_\_\_\_

Cell Phone (    ) \_\_\_\_\_

3. Please list any medical issues we should be aware of (in case you should take ill while traveling):

\_\_\_\_\_

4. Please list any restrictions that may prevent you from fully participating in activities during the trip.

\_\_\_\_\_

5. Are you taking medication?                      Yes \_\_\_ No \_\_\_  
If yes, what?

\_\_\_\_\_

6. Do you have Health Insurance?                      Yes \_\_\_ No \_\_\_

Name of Insurance

This form is available at [wcsu.edu/studentlife](http://wcsu.edu/studentlife).

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# Appendix iv

## CSU TRAVEL AUTHORIZATION

CSUFRS – 30 (9/05)

**Western Connecticut State University**  
**181 White Street**  
**Danbury CT 06810**

1. Use this form to obtain prior approval for all out of state travel and in-state trips involving any non-mileage expense greater than \$25.00 per trip.
2. Type and get authorized signature(s) then forward it with substantiating documentation to the Office of Institutional Services.
3. If personal car will be used; a current copy of the car insurance policy must be on file prior to processing this TA.

(1) T. A. No.
(2) <input type="checkbox"/> Original <input type="checkbox"/> Revised
(3) Requested Date:

(4) Employee Name:	(5) Home Phone:	(6) SS #/ID #:
(7) Title:	(8) Work Phone:	(9) Employee #:
(10) OFFICIAL DUTY STATION: 181 White Street, Danbury CT 06810		
(11) Collective Bargaining Unit: <input type="checkbox"/> AAUP <input type="checkbox"/> MGMT <input type="checkbox"/> SUOAF-AFSCME <input type="checkbox"/> Other		

ITINERARY		DEPART		RETURN		CARRIER INFO
(12) Home/Duty Station	(13) Travel To	(14) Date	Hour	(15) Date	Hour	(16) Flight/Rail/Bus

(17) **Object and Necessity of Travel** (Attach substantiating documents)

SAMPLE

01 Paper Presentation     03 Research     05 Teaching/Training     07 Faculty Development     09 Other Activities  
 02 Conf./Workshop     04 Recruiting (Athletic)     06 Other     08 Univ. Development     99 Other (Describe)

(18) **TYPE OF TRANSPORTATION**

Air     Central Reservations     Outside Agency     Personally Owned Car    Car Policy Exp. Date \_\_\_\_\_  
 Rail     Central Reservations     Outside Agency     State Owned Car  
 Parking Permit Bradley Airport City \_\_\_\_\_    Names of Riders: \_\_\_\_\_

(19) Reg. Prepaid by Agency:     Yes    (20) Vendor's FEIN # (MANDATORY) \_\_\_\_\_    Voucher No. \_\_\_\_\_

(21) Travel Advance Requested:    \$ \_\_\_\_\_    (22) Amount Requested:    \$ \_\_\_\_\_    Voucher No. \_\_\_\_\_

**Total Cost (Itemize)** Note: Rates for meals and lodging should not exceed those provided for in standard Travel Regulations and in Collective Bargaining Agreements.

(23) Airfare/Rail _____	(29) Lodging (Per Diem Rate) \$ _____	
(24) Registration _____	(30) Conference Hotel _____	
(25) Rental Car _____	(31) Hotel Tax _____	
(26) Taxi/Limo _____	(32) Meals (Per Diem Rate) \$ _____	
(27) Parking/Toll _____	(33) Personal Mileage _____ Miles @ 44.5 cents	
(28) Other (Specify)- _____	<b>TOTAL COST \$ _____</b>	

(34) Banner Org	(35) Account	(36) Amount	Auth. Signature	Banner Org	Account	Amount	Auth. Signature

(37) **AUTHORIZED SIGNATURES**

Employee Signature _____	Date: _____
Approved By: (Supervisor) _____	Date: _____
Approved By: (Dean/Dir) _____	Date: _____
Authorized by (President/VP) _____	Date: _____

# Appendix v

<b>Form W-9</b> (Rev. October 2007) Department of the Treasury Internal Revenue Service	<b>Request for Taxpayer          Identification Number and Certification</b>	<b>Give form to the          requester. Do not          send to the IRS.</b>
Print or type See Specific instructions on page 2.	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ..... <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.)	Requestor's name and address (optional)
	City, state, and ZIP code	
List account number(s) here (optional)		

<b>Part I Taxpayer Identification Number (TIN)</b>					
Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.	<table border="1" style="width: 100%; height: 30px; margin-bottom: 5px;"> <tr> <td style="text-align: center;">Social security number</td> </tr> <tr> <td style="text-align: center;">: : :</td> </tr> </table> <p style="text-align: center;">OR</p> <table border="1" style="width: 100%; height: 30px;"> <tr> <td style="text-align: center;">Employer identification number</td> </tr> <tr> <td style="text-align: center;">: : : : : : :</td> </tr> </table>	Social security number	: : :	Employer identification number	: : : : : : :
Social security number					
: : :					
Employer identification number					
: : : : : : :					
<b>Note.</b> If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.					

<b>Part II Certification</b>	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and 3. I am a U.S. citizen or other U.S. person (defined below).	
<b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.	

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

**General Instructions**  
 Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**  
 A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

## Appendix vi

### **The Role of an Advisor on a Club Sponsored Trip**

- Advisors must be available for students that may need assistance during the trip, which may include having a cell phone number made available to students and hotel room number (in the case of a conference or overnight trip).
- In the event of an emergency:
  - The students **MUST** make contact with the Advisor (via information given on the Trip Information Card).
  - The Advisor will then contact Campus Police (203-837-9300) and explain the emergency situation. Do not contact the emergency contact listed on the **Emergency Contact and Health Information Form** enclosed in the Advisor's Trip Packet.
  - The Campus Police Officer/Dispatcher will then reference the paperwork for the trip completed by each participant (Left at the police department by the Student Life/Student Activities Office). Campus Police will contact the Student Affairs administrator on duty and have the Student Affairs administrator speak directly to you.
  - The advisor will need to be in constant contact with Campus Police or the Student Affairs administrator with any updates of the emergency situation.
- Upon departure, be sure that all students are accounted for. If there are students not returning with the group and you must depart (after a reasonable time waiting for the students to return to the rendezvous point) please follow the emergency protocols established above. In addition, a note must be taken after which the Advisor must e-mail Student Life at the conclusion of the trip.
- In the event a non emergent incident should arise during the trip, please contact me immediately via e-mail with exact details concerning the incident upon return to the University. Follow up meetings will then be scheduled to discuss the issues.

This form is available at [wcsu.edu/studentlife](http://wcsu.edu/studentlife).

## Appendix vii

### Western Connecticut State University Student Club Pre-Travel Orientation (Domestic Travel)

➤ Student Club:

➤ Student Contact Name:

Phone:

Email:

This form is available at [wcsu.edu/studentlife](http://wcsu.edu/studentlife).

➤ Advisor Name:

Phone:

Email:

Contact information for WCSU faculty/staff during trip:

➤ Name of Conference/Trip Destination:

➤ Date(s) of Travel:

➤ Lodging Information:

Hotel/Lodging name:

Address:

Phone:

➤ Meeting/departure time:

➤ Agenda/itinerary:

➤ Safety and emergency information:

➤ Any personal money needed:

➤ Packing (what to pack or what not to pack):

➤ Common sense thinking when traveling:

➤ The Code of Conduct and the University's expectation of those traveling including alcohol and other drug use policies:

➤ Other Notes:

## Appendix viii

### Western Connecticut State University Student Club Pre-Travel Orientation (International Travel)

- Student Club:
- Student Contact Name:
  - Phone:
  - Email:
- Advisor Name:
  - Phone:
  - Email:
  - Contact information for WCSU faculty/staff during trip:
- Name of Conference/Trip Destination:
- Date(s) of Travel:
- Lodging Information:
  - Hotel/Lodging name:
  - Address:
  - Phone:
- Meeting/departure time:
- Visas, passports and any paperwork associated needed for international travel
- Agenda/itinerary:
- Safety and emergency information:
- Health Insurance/vaccines
- Any personal money needed/currency:
- Packing (what to pack or what not to pack):
- Common sense thinking when traveling:
- Cultural Sensitivity/Culture Shock
- Food (what to eat/what to stay away from)
- Being an American in another country
- The Code of Conduct and the University's expectation of those traveling including alcohol and other drug use policies

This form is available at [wcsu.edu/studentlife](http://wcsu.edu/studentlife).