

TRAVEL STUDY HANDBOOK

Note: 2024 Travel Study programs are scheduled to run but circumstances are subject to change.



COVID-19 Impacts - Summer 2024

[Return to Learn website](#) - Latest updates on UC San Diego campus operations & requirements for COVID-19 testing, vaccines, and masking.

[Academic Affairs FAQs and Resources Hub](#) – Latest policies on course modality for faculty.

Field Research School - Summer Session 2024

Session 1: July 1, 2024– August 3, 2024

Session 2: August 5, 2024– September 7, 2024



Travel Study Overview

Travel Study programs are UC San Diego faculty-led programs that allow students to experience field research techniques domestically or internationally in a hands-on environment. Field Planner review and approval from Risk Management

The academic department and faculty coordinate with Global Education to create and administer Travel Study programs. All Travel Study programs must contain the components listed below:

- Trip itinerary and arrangements
- Contract negotiations (transportation, accommodations, tours, etc.)
- Program application and promotional materials
- Student Handbook (transportation, accommodations, safety protocols, emergency contacts, etc.)
- Student Recruitment
- Processing of liability waivers
- Purchasing International travel insurance
- Adhering to all campus policies (risk management, contracts and procurement, travel rules, AP policy, etc.)

Courses

Courses in Travel Study programs must be approved by the Academic Senate, endorsed by the Department Chair, and submitted to Summer Session in the ISA for approval.

Students

Students are required to enroll in one or two courses as required by the program. Students may have the option to enroll in independent studies to increase the total number of units to a maximum of 12.

In addition to Summer Session tuition and campus-based fees, students participating in Travel Study programs are assessed additional program fees. The Campus Budget Office must approve Travel Study program fees.

Students may be required to submit a deposit payment of the Travel Study program fee prior to enrolling in courses. Students can pay deposits as check payments, which departments should send to the Central Cashier's Office. Students are still responsible for paying the standard Summer Session tuition and campus-based fees once those charges post to their student accounts.

Faculty

Travel Study Faculty are compensated following the standard Summer Session compensation model of 8.5% annual salary per 4-unit course. All UC San Diego Academic Personnel policies and restrictions apply. See the [Faculty Compensation](#) section for details.

Graduate Students as Staff Volunteers

Some programs may have a graduate student serve as an "unofficial chaperone," accompanying large groups on their travels. The instructor may ask the graduate student to help with undergraduate students in various capacities required for travel (ex: help students change money, making international calls, communicate with local guides, or assist with cultural differences between American students and locals). Due to the risks and liabilities involved, all graduate students accompanying Travel Study groups will officially be appointed as Staff Volunteers and registered for the University's travel insurance.

*** No academic duties are involved ***

Appointment: Staff Volunteer

Required: Business Travel Accident Insurance

Timeline Overview

How Departments/Programs Can Set-Up a Travel Study Program

SEPTEMBER/OCTOBER	Facilitate Discussion between Faculty, Department Admin and Chair.
NOVEMBER	Propose Courses to Summer Session in the ISA Submit Program Documentation to Global Education for approval. <ul style="list-style-type: none"> • Program Fee Proposal Form • Field Operational Planner • Student Handbook • Staff Volunteer Appointment Form • Vendor Contracts
DECEMBER + JANUARY	Recruit Students
FEBRUARY + MARCH	Prepare for Student Payments Coordinate Faculty Training (with Global Education/Study Abroad)
APRIL	Remind Students to Enroll Confirm Vendor Contract(s)
MAY	Financial Aid Disbursement Begins
JUNE	Audit Student Payments and Enrollment
JULY - SEPTEMBER	SET Forms + Audit + Reconciliation

Travel Study - Department Checklist

SEPTEMBER/OCTOBER – Planning your Travel Study Program(s)

- Facilitate conversations between faculty, department admin and department Chair.
- Faculty should finalize course concept and get Department Chair endorsement.

NOVEMBER – Propose Courses, Complete Program Documentation & Required Form

- Submit Travel Study courses to Summer Session for approval.
These courses should be part of your Summer Session Schedule Build that contains all the courses your department is proposing for Summer 2024.
- Complete your Travel Study packet for Global Education to review and approve. It should include the following:

1. **Program Fee Proposal Form**, which is an Excel file that can be found here:

<http://blink.ucsd.edu/files/finance-tab/cbo/ProgramFeeTemplate-November-2008-Revised.xls>

The Program Fee Proposal Form Excel file has 3 Worksheets:

Worksheet 1 - Program Fee Form with Department Chair signature. (Exhibit A)

Worksheet 2 - Budget Page with Department Business Officer (formerly “MSO”) signature. (Exhibit B)

- The Budget Page outlines the process to create a Program Fee.
- Summer Session pays the faculty salary to teach a Travel Study program. The students via a Program Fee pay all other faculty costs for the Travel Study trip.
- The **Faculty Costs** portion of the program fee should include the total cost to accommodate the faculty. That total cost is divided by the projected number of students enrolled to determine a per student cost.
- The **Faculty Costs - Per Diem** line item is not the official per diem rate for university business travel. Instead, accurate projections for faculty transportation, meals, accommodations and any other trip costs should be included. The goal is to keep program fees as low as possible for students, while accurately projecting the cost of the program.

Worksheet 3 – Instructions on how to complete Exhibits A and B.

Refer to Special Program Fee Guidelines for Faculty-Led Summer Study Abroad Opportunities:

<http://blink.ucsd.edu/files/finance-tab/cbo/ProgramFeeCampusGuidelines-Final-4-21-09.pdf>

2. **Field Operational Planner** – There are two different versions, depending on whether your Travel Study program is domestic or International.

Domestic Travel Study Programs:

- a) Complete the online Field Operation Planner here: <http://blink.ucsd.edu/sponsor/EHS/forms-ehs/domestic-fop.html>
- b) Risk Management will respond to the Field Operation Planner via email. Please forward that email to Summer Session.

International Travel Study Programs:

- a) Download the PDF Field Operational Planner here:
PDF version - http://blink.ucsd.edu/files/safety-tab/risk/fo_planner.pdf
Word version - http://blink.ucsd.edu/files/safety-tab/risk/fo_planner.doc
- b) Submit the completed Field Operational Planner to an EH&S Field Safety coordinator (ehsrisk@ucsd.edu or gensafety@ucsd.edu) for review.
- c) Forward the response from Risk Management to Summer Session.

More information on the Field Operational Planner can be found at:

<http://blink.ucsd.edu/safety/risk/field-safety-plan.html#UC-San-Diego-contacts-and-resou>

3. **Student Handbook** - Include the information below.

- Program outline and Schedule
- Course Syllabus
- Accommodations & Dining
- Transportation
- Medical Facilities, Health Insurance Info, etc.
- Safety Precautions
- Packing Recommendations – Money, Clothing, Suggested Items
- Drafts of Student Forms:
 - Program application
 - Waiver of liability
 - Agreement to release Dept.
 - Physician's medical exam
 - Student payment agreement for program fee and tuition

4. **Vendor contracts** (if applicable)

Submit any vendor contracts to Procurement for review and approval.

<https://blink.ucsd.edu/sponsor/BFS/divisions/ipps/procurement-contracts/index.html>

5. **Staff Volunteer Appointment Form** (if applicable)

A Staff Volunteer Appointment Form is required for any individual who will accompany faculty and students on the trip.

<http://www-hr.ucsd.edu/qwl/policies/pdf/sp3vol.pdf>

DECEMBER – Course Approvals & Student Recruitment

- Verify course approvals (coordinate with Summer Session)
- Begin recruiting students.
 - Complete course syllabus, trip itinerary, and student program application (pending program fee approval by CBO)
 - Consider using: Info Sessions, Website, Advising

JANUARY – More Student Recruitment

- Continue recruiting students.
Global Education routes final Program Fee Proposal Form to Dean of Undergraduate Education (DUE) for approval.

FEBRUARY – Prepare for Student Payments

- Create detail code (new programs only)
 - Request detail code setup with Student Business Services (SBS)
 - Confirm fund & acct info with General Accounting Office
 - Instructions on how to create an ISIS Detail Code can be found at:
<http://blink.ucsd.edu/finance/accounting/accounts-receivable/detail-code.html>
- Create deposit header codes (new programs only)
 - Contact Central Cashier to create deposit header code
- Establish and collect program prepayment from students
 - Students pay via check at Cashier's Office

Global Education will route Program Fee Proposal Form to Campus Budget Office (CBO) after DUE approval.

Deadline: February 28, 2024.

MARCH – Fee Approval & Faculty Training

- Training program for faculty conducting fieldwork (i.e.: emergency protocol, student management while off campus, etc.)
 - Work with Global Education/Study Abroad to create training session (optional)

CBO approves Program Fee by end of March.

APRIL – Students Enroll & Pay

- Preauthorize students for course(s)
- Remind students to enroll in the course(s)

CBO will notify department of Fee Approval

Registrar will attach and post program fee to the course

Students pay program fee via check to Cashier's Office

MAY – Financial Aid

- Financial Aid disbursements begin.
- Ensure vendor payments are made according to contract.

JUNE – Audit Tuition Payments

- Audit and confirm student tuition payments

JULY - SEPTEMBER – SET and Program Audit

- Ensure students complete course evaluations (SET and/or Dept. evaluation)
- Audit payments and expenses for the program