Travel Approval Process
Traveler/Study Abroad Planner and Requestor Checklists
May 14, 2021

Members of the Rutgers community who are requesting an exception to the current Rutgers University domestic and international travel ban should review the following items before submitting a Travel Ban Exception Request through the DocuSign form submission software platform. The forms can all be found on the Travel Guidance Travel Guidance page of the Office of the Executive Vice President for Academic Affairs website. This travel exception does not include personal travel that is fully funded by the individual, and where the individual is not representing the University in any capacity. An individual may assist the Traveler or the Study Abroad Planner in the completion and submission of these forms, and they are referred to as the “Requestor” on the forms. Please note that in the DocuSign platform, when the Requestor initiates the request form, only the submitter will have the ability to edit the form, however, they can save a partially completed form and transmit it to the Traveler to have them sign the Travel Waiver and complete any other items on the form, and also request that the Traveler is copied on the review outcome.

1. Decide which form is appropriate for the proposed travel:
   A. **Form A – Research and Academic Travel** – the proposed travel will assist the Rutgers employee or student in moving forward with their research, their coursework planning, their academic credentials, their movement forward for the completion of their degree, the nurturing of their academic network, or other research or academic undertaking. *Instructions begin on Page 3.*
   B. **Form B - Non-Academic Travel** – the proposed travel has no connection with a research or academic outcome, such as staff participation in a non-academic conference or meeting, an athletic event, examination of a potential vendor product or service not related to a Rutgers academic program, etc. *Instructions begin on Page 5.*
   C. **Form SA1 - Faculty-led Study Abroad Travel** – the proposal of a Study Abroad program that will be led by a current Rutgers Faculty member. This form is submitted following the review and approval of a Petition for Study Abroad by Rutgers Global – Study Abroad. *Instructions begin on Page 9.*
   D. **Form SA2 – External Provider Study Abroad Travel** – the proposal of a Study Abroad program that will be conducted in partnership with a vendor outside of Rutgers University. This form is submitted following the review and approval of a Petition for Study Abroad by Rutgers Global – Study Abroad. *Instructions begin on Page 12.*

2. Before initiating form completion through the DocuSign software platform, open the PDF version of the form found on the site, and review the requested items to gather the necessary information prior to starting the DocuSign process.
3. A checklist of items for the form is presented on the following pages, corresponding to the order of items on the form.

4. Once you are ready to prepare and submit the form, click on the respective DocuSign form found at https://academicaffairs.rutgers.edu/travel-guidance to begin the process.
Form A – Research and Academic Travel

When you begin the DocuSign form submission process, you will first provide the Name and Rutgers Email Address of the Requestor, and then the Traveler, as shown below. If you are the Traveler, and submitting your own form, enter your information in the first section as the Requestor. Only the person listed in this first item will have access to edit the form.

You can save a partially completed form and transmit it to the Traveler to have them sign the Travel Waiver and complete any other items on the form, and also request that the Traveler is copied on the review outcome.

You will next need to provide the Name and Rutgers Email Address of each of the following individuals:

- Funding Source Business Office Representative
- Department Chair
- Dean, or the Director of the Center or Institute
- Chancellor/Provost, or the Executive Vice President for Academic Affairs

Once you have entered their Names and Rutgers Email Addresses, click on Begin Signing to start completing your respective Form. At the top of the form click on the yellow Continue box to enter the Form.

The following items align with the requested information for the completion of Form A:

1. Identify your Rutgers affiliation.

Select the box that best identifies your affiliation with the University in your proposed travel plan. If you select Other, explain the affiliation in the space provided. If the form is being submitted for Group travel (more than 1 person all following the same itinerary), select all of the affiliations that apply. If members
of the group are following different itineraries, a separate form will need to be submitted for each unique itinerary.

2. Is the primary purpose of travel to conduct research/academic activities that are time-critical, cannot be delayed without serious disruption to degree/career advancement or funded contracts, and cannot be performed remotely or by alternative personnel at the off-campus location? If yes, please explain.

In answer to the question, select Yes or No. Provide an explanation of the critical nature of the proposed travel. If you require further space than is provided on Page 1, add this information in the box under Additional Details for Questions on Page 1, found on Page 4.

3. Has funding been allocated, either internally or externally, for this travel? If yes, please provide source of funding and estimated total travel amount that is to be funded through Rutgers for this travel.

In answer to the question, select Yes or No. Provide the Funding Source that will reimburse your travel costs, and the estimated amount of all travel costs, including transportation, hotels, meals, shuttles, etc. If you need to provide further explanation, add this to the box on Page 4.

4. Review the levels of risk according to the Centers for Disease Control and Prevention (CDC) and the respective country or state’s travel advisory list. See also the State Department’s Travel Advisory. Can these levels of risk be managed by the Traveler? Details the risks, and explain how they will be managed.

Review the respective websites for your proposed travel, and in answer to the question, select Yes or No. Explain the documented levels of risk and how you will accommodate these. If you need to provide further explanation, add this to the box on Page 4.

5. Does the research/academic activity and planned travel follow all COVID-19 laws, regulations, and protocols established by the Traveler’s home and destination countries or state? Explain as appropriate, including planning for avoiding/mitigating any pandemic-related travel, quarantining, or health issues.

In answer to the question, select Yes or No. Provide explanation of the necessary COVID-19 precautions you will undertake in your planned travel, and how you will accommodate any potential quarantining or health issues should you be exposed to or contract COVID-19 during your travels. If you need to provide further explanation, add this to the box on Page 4.

6. Can the six Safety First Principles referred to in the Guidelines for Domestic and International Travel be adhered to in the course of the research/academic activity and planned travel?

In answer to the question, select Yes or No. Provide explanation of how you will adhere to the Safety First Principles during your travel. If you need to provide further explanation, add this to the box on Page 4.
7. Under **Traveler and Requestor Information**, provide the requested information. If there is no Requestor assisting the Traveler in preparing and/or submitting the form, leave this information blank. Include the full dates of travel for the time that you will be requiring reimbursement of expenses.

8. Under **COVID-19 Vaccination Status** indicate if you will have completed a full course of Rutgers-accepted COVID-19 vaccine, including the required 2 week waiting period, prior to the start of the proposed travel.

9. Provide an overview of the proposed **Purpose of Travel**, that will assist the reviewers in assessing this exception to the travel ban.

10. Leave the **For Business Office Use Only** section blank. This will be completed by the Funding Source Business Office Representative once the form is submitted in DocuSign.

11. Under **Type of Travel** indicate the responsibilities that you will be undertaking during the proposed travel. If you are completing the form on behalf of group travel, when you check the Group box, a field will be provided for you to add the Group Contact Person’s Name, and their email address.

12. Under **Trip Itinerary** complete all of the legs of travel from beginning to end of the proposed travel, adding additional legs in the boxes on Page 4. Include the **Means of Travel** (rail, air, boat, car, etc.) for each leg.

13. If you have further documentation that can aid the reviewers in assessing your need for an exception to the travel ban, click on the paperclip icon on the right side of the form to add these as attachments to the Form.

14. For the **Travel Requirements Representation Related to COVID-19**, add the Traveler’s name, at the beginning of this section, and then add the Traveler’s Signature through DocuSign, and the Traveler’s Name again. DocuSign will add the Date of the signature during the form completion process.

15. If this is for group travel, complete the **Group Travel Listing** on Page 5 of the form. This document can be updated as the members of the group are finalized, and as they provide vaccination information and signed and dated **Travel Waiver Forms**. This is accomplished by editing the final approved version of the form, and submitting this edited form with all group information completed on Page 5 to travelauth@rutgers.edu prior to the start of travel.

Once the information is completed to the best of your ability, click on the **Finish** button to submit the form in DocuSign. DocuSign will provide a field to add the Rutgers Email Address for the Requestor to also be notified of the outcome of the form review. The review outcome will be received via email from the **Travel Authorization** mailbox.
Form B – Non-Academic Travel

When you begin the DocuSign form submission process, you will first provide the Name and Rutgers Email Address of the Requestor, and then the Traveler, as shown below. If you are the Traveler, and submitting your own form, enter your information in the first section as the Requestor. Only the person listed in this first item will have access to edit the form.

You can save a partially completed form and transmit it to the Traveler to have them sign the Travel Waiver and complete any other items on the form, and also request that the Traveler is copied on the review outcome.

Next, you will need to provide the Name and Rutgers Email Address of each of the following individuals:

- Funding Source Business Office Representative
- Immediate Supervisor Department Chair
- Dean, or the Director of the Center or Institute
- Executive or Senior Vice President of the respective department, or the Chancellor/Provost

Once you have entered their Names and Rutgers Email Addresses, click on Begin Signing to start completing your respective Form. At the top of the form click on the yellow Continue box to enter the Form.

The following items align with the requested information for the completion of Form B:

1. **Identify your Rutgers affiliation.**

Select the box that best identifies your affiliation with the University in your proposed travel plan. If you select *Other*, explain the affiliation in the space provided. If the form is being submitted for Group travel...
(more than 1 person, all following the same itinerary), select all of the affiliations that apply. If members of the group are following different itineraries, a separate form will need to be submitted for each unique itinerary.

2. **Is the primary purpose of travel to conduct activities that are time-critical, cannot be delayed without serious disruption, and cannot be performed remotely or by alternative personnel at the off-campus location?** If yes, please explain.

In answer to the question, select Yes or No. Provide an explanation of the critical nature of the proposed travel. If you require further space than is provided on Page 1, add this information in the box under **Additional Details for Questions on Page 1**, found on Page 4.

3. **Has funding been allocated, either internally or externally, for this travel?** If yes, please provide source of funding and estimated total travel cost.

In answer to the question, select Yes or No. Provide the Funding Source that will reimburse your travel costs, and the estimated amount of all travel costs, including transportation, hotels, meals, shuttles, etc. If you need to provide further explanation, add this to the box on Page 4.

4. **Review the levels of risk according to the Centers for Disease Control and Prevention (CDC) and/or the respective country or state’s travel advisory list. See also the State Department’s Travel Advisory. Can these levels of risk be managed by the Traveler?** Details the risks, and explain how they will be managed.

Review the respective websites for your proposed travel, and in answer to the question, select Yes or No. Explain the documented levels of risk and how you will accommodate these. If you need to provide further explanation, add this to the box on Page 4.

5. **Does the planned activity and travel follow all COVID-19 laws, regulations, and protocols established by the Traveler’s home and destination countries or state?** Explain as appropriate, including planning for avoiding/mitigating any pandemic-related travel, quarantining, or health issues.

In answer to the question, select Yes or No. Provide explanation of the necessary COVID-19 precautions you will undertake in your planned travel, and how you will accommodate any potential quarantining or health issues should you be exposed to or contract COVID-19 during your travels. If you need to provide further explanation, add this to the box on Page 4.

6. **Can the six Safety First Principles referred to in the Guidelines for Domestic and International Travel be adhered to in the course of the planned activity and travel?**

In answer to the question, select Yes or No. Provide explanation of how you will adhere to the Safety First Principles during your travel. If you need to provide further explanation, add this to the box on Page 4.
7. Under **Traveler and Requestor Information**, provide the requested information. If there is no Requestor assisting the Traveler in preparing and/or submitting the form, leave this information blank. Include the full dates of travel for the time that you will be requiring reimbursement of expenses.

8. Under **COVID-19 Vaccination Status** indicate if you will have completed a full course of Rutgers-accepted COVID-19 vaccine, including the required 2 week waiting period, prior to the start of the proposed travel.

9. Provide an overview of the proposed **Purpose of Travel**, that will assist the reviewers in assessing this exception to the travel ban.

10. Leave the **For Business Office Use Only** section blank. This will be completed by the Funding Source Business Office Representative once the form is submitted in DocuSign.

11. Under **Type of Travel** indicate the responsibilities that you will be undertaking during the proposed travel. If you are completing the form on behalf of group travel, when you check the Group box, a field will be provided for you to add the Group Contact Person’s Name, and their email address.

12. Under **Trip Itinerary** complete all of the legs of travel from beginning to end of the proposed travel, adding additional legs in the boxes on Page 4. Include the **Means of Travel** (rail, air, boat, car, etc.) for each leg.

13. If you have further documentation that can aid the reviewers in assessing your need for an exception to the travel ban, click on the paperclip icon on the right side of the form to add these as attachments to the Form.

14. For the **Travel Requirements Representation Related to COVID-19**, add the Traveler’s name, at the beginning of this section, and then add the Traveler’s Signature through DocuSign, and the Traveler’s Name again. DocuSign will add the Date of the signature during the form completion process.

15. If this is for group travel, complete the **Group Travel Listing** on Page 5 of the form. This document can be updated as the members of the group are finalized, and as they provide vaccination information and signed and dated **Travel Waiver Forms**. This is accomplished by editing the final approved version of the form, and submitting this edited form with all group information completed on Page 5 to travelauth@rutgers.edu prior to the start of travel.

Once the information is completed to the best of your ability, click on the **Finish** button to submit the form in DocuSign. DocuSign will provide a field to add the Rutgers Email Address for the Requestor to also be notified of the outcome of the form review. The review outcome will be received via email from the **Travel Authorization** mailbox.
Form SA1 – Faculty-led Study Abroad Travel

Before completing Form SA1, a Petition for Study Abroad Student Travel During the Time of COVID-19 must be submitted and approved by the Rutgers Global – Study Abroad Office, and the approved form will be submitted along with Form SA1.

When you begin the DocuSign form submission process, you will first need to provide the Name and Rutgers Email Address of the Requestor, and then the Traveler, as shown below. If you are the Traveler, and submitting your own form, enter your information in the first section as the Requestor. Only the person listed in this first item will have access to edit the form.

You can save a partially completed form and transmit it to the Traveler to have them sign the Travel Waiver and complete any other items on the form, and also request that the Traveler is copied on the review outcome.

Next, you need to provide the Name and Rutgers Email Address of each of the following individuals:

- Funding Source Business Office Representative
- Immediate Supervisor Department Chair
- Dean
- Executive or Senior Vice President of the respective department, or the Chancellor/Provost

Once you have entered their Names and Rutgers Email Addresses, click on Begin Signing to start completing your respective Form. At the top of the form click on the yellow Continue box to enter the Form.
The following items align with the requested information for the completion of Form SA1:

1. **Identify your Rutgers affiliation.**
   
   Select the box that best identifies your affiliation with the University. If you select *Other*, add your affiliation in the provided space.

2. **Is the primary purpose of travel to study abroad, to perform research abroad, to participate in an internship, or to participate in a service-learning program?**
   
   Select all of the purposes that apply to the proposed Study Abroad program.

3. **Will the program be for-credit or not-for-credit?**
   
   Select the Rutgers credit alignment that applies to the proposed Study Abroad program.

4. **Please list (or attach a copy of) the CDC and US State Department risk levels as of the date of filing. Can these levels of risk be managed by the program director and students? Please explain how risks will be managed, including likely hospitals/clinics/doctors that would be accessible should you or someone in the program test positive or fall ill. Please note that Rutgers University strongly recommends that all travelers have been vaccinated for COVID-19 prior to travel.**
   
   Review the respective websites for your proposed travel and in answer to the question select *Yes* or *No*. Explain the documented levels of risk and how you will accommodate these, and any potential health issues that may arise during the Study Abroad program. To attach additional documentation, click on the paperclip icon on the right side of the form. If you need to provide further explanation, add this to the box on Page 4.

5. **Can the Rutgers Safety First Principles referred to in the [Guidelines for Domestic and International Travel](#), as well as all COVID-19 regulations and guidelines of New Jersey, the US government, and the countries/locations visited during the travel and while abroad be adhered to in the course of the activity and planned travel? Explain as appropriate.**
   
   In answer to the question, select *Yes* or *No*. Provide an explanation of how you will comply with the relevant COVID-19 regulations during the Study Abroad program. If you need to provide further explanation, add this to the box on Page 4.

6. **Has the study abroad travel plan been pre-approved by the Rutgers Global Study Abroad office? If so, please attach their response/recommendation.**
   
   In answer to the question, select *Yes* or *No*, and click on the paperclip icon on the right side of the form to attach the approved *Petition for Study Abroad Student Travel During the Time of COVID-19* and response.

7. **Under Study Abroad Planner and Requestor Information, provide the requested information. If there is no Requestor assisting the Study Abroad Planner in preparing and/or submitting the form, leave**
this information blank. Include the full dates of travel for the time that you will be requiring reimbursement of expenses.

8. Provide an overview of the proposed **Purpose of Travel**, that will assist the reviewers in assessing this exception to the travel ban.

9. Leave the **For Business Office Use Only** section blank. This will be completed by the Funding Source Business Office Representative once the form is submitted in DocuSign.

10. Under **Trip Itinerary** complete all of the legs of travel from beginning to end of the proposed travel, adding additional legs in the boxes on Page 4. Include the **Means of Travel** (rail, air, boat, car, etc.) for each leg.

11. If you have further documentation that can aid the reviewers in assessing your need for an exception to the travel ban, click on the paperclip icon on the right side of the form to add these as attachments to the Form.

12. For the **Study Abroad Planner Travel Requirements Representation Related to COVID-19**, add the Study Abroad Planner’s name, at the beginning of this section, and then add their Signature through DocuSign, and their Name again. DocuSign will add the Date of the signature during the form completion process. Prior to the start of the Study Abroad program, a separate **Travel Waiver Form** must be completed and signed by each participant of the program.

Once the information is completed to the best of your ability, click on the **Finish** button to submit the form in DocuSign. DocuSign will provide a field to add the Rutgers Email Address for the Requestor to also be notified of the outcome of the form review. The review outcome will be received via email from the **Travel Authorization** mailbox.
Form SA2 – External Provider Study Abroad Travel

Before completing Form SA2, a Petition for Study Abroad Student Travel During the Time of COVID-19 must be submitted and approved by the Rutgers Global – Study Abroad Office, and the approved form will be submitted along with Form SA2.

When you begin the DocuSign form submission process, you will first need to provide the Name and Rutgers Email Address of the Requestor, and then the Traveler, as shown below. If you are the Traveler, and submitting your own form, enter your information in the first section as the Requestor. Only the person listed in this first item will have access to edit the form.

You can save a partially completed form and transmit it to the Traveler to have them sign the Travel Waiver and complete any other items on the form, and also request that the Traveler is copied on the review outcome.

Next you will provide the Name and Rutgers Email Address of each of the following individual:

- Funding Source Business Office Representative

Once you have entered their Names and Rutgers Email Addresses, click on Begin Signing to start completing your respective Form. At the top of the form click on the yellow Continue box to enter the Form.

The following items align with the requested information for the completion of Form SA2:

1. Identify your Rutgers affiliation.

Select the box that best identifies your affiliation with the University. If you select Other, explain your affiliation in the provided space.
2. **Is the primary purpose of travel to study abroad, to perform research abroad, to participate in an internship, or to participate in a service-learning program?**

Select all of the purposes that apply to the proposed Study Abroad program.

3. **Will the program be for-credit or not-for-credit?**

Select the Rutgers credit alignment that applies to the proposed Study Abroad program.

4. **Please list (or attach a copy of) the CDC and US State Department risk levels as of the date of filing. Can these levels of risk be managed by the program director and students? Please explain how risks will be managed, including likely hospitals/clinics/doctors that would be accessible should you or someone in the program test positive or fall ill. Please note that Rutgers University strongly recommends that all travelers have been vaccinated for COVID-19 prior to travel.**

Review the respective websites for your proposed Study Abroad program and in answer to the question select Yes or No. Explain the documented levels of risk and how you will accommodate these, and any potential health issues that may arise during the Study Abroad program. To attach additional documentation, click on the paperclip icon on the right side of the form. If you need to provide further explanation, add this to the box on Page 4.

5. **Can the Rutgers Safety First Principles referred to in the Guidelines for Domestic and International Travel, as well as all COVID-19 regulations and guidelines of New Jersey, the US government, and the countries/locations visited during the travel and while abroad be adhered to in the course of the activity and planned travel? Explain as appropriate.**

In answer to the question, select Yes or No, and provide explanation of how you will comply with the relevant COVID-19 regulations during the Study Abroad program. If you need to provide further explanation, add this to the box on Page 4.

6. **Has the study abroad travel plan been pre-approved by the Rutgers Global Study Abroad office? If so, please attach their response/recommendation.**

In answer to the question, select Yes or No, and click on the paperclip icon on the right side of the form to attach the approved Petition for Study Abroad Student Travel During the Time of COVID-19 and response.

7. **Under Study Abroad Planner and Requestor Information, provide the requested information. If there is no Requestor assisting the Study Abroad Planner in preparing and/or submitting the form, leave this information blank. Include the full dates of travel for the time that you will be requiring reimbursement of expenses.**

8. **Provide an overview of the proposed Purpose of Travel, that will assist the reviewers in assessing this exception to the travel ban.**
9. Leave the **For Business Office Use Only** section blank. This will be completed by the Funding Source Business Office Representative once the form is submitted in DocuSign.

10. Under **Trip Itinerary** complete all of the legs of travel from beginning to end of the proposed travel, adding additional legs in the boxes on Page 4. Include the **Means of Travel** (rail, air, boat, car, etc.) for each leg.

11. If you have further documentation that can aid the reviewers in assessing your need for an exception to the travel ban, click on the paperclip icon on the right side of the form to add these as attachments to the Form.

12. For the **Study Abroad Planner Travel Requirements Representation Related to COVID-19**, add the Study Abroad Planner’s name, at the beginning of this section, and then add their Signature through DocuSign, and their Name again. DocuSign will add the Date of the signature during the form completion process. Prior to the start of the Study Abroad program, a separate **Travel Waiver Form** must be completed and signed by each participant of the program.

Once the information is completed to the best of your ability, click on the **Finish** button to submit the form in DocuSign. DocuSign will provide a field to add the Rutgers Email Address for the Requestor to also be notified of the outcome of the form review. The review outcome will be received via email from the **Travel Authorization** mailbox.