Foreign Travel and Insurance Checklist

Planning and Approval

1. **Coordinate with Your Department:**
   o Discuss and finalize the purpose, itinerary, and duration of the travel.
   o Ensure the trip aligns with university objectives and has departmental support.
2. **Create a Travel Request (TR) in Concur:**
   o Access the Concur system to initiate a Travel Request (TR).
   o Follow the Concur Travel Request Guide to complete the TR form.
   o Include detailed trip information such as dates, locations, CSUF/personal travel, flight layovers, and purpose.
   o Submit the TR for departmental review and approval.

Securing Foreign Travel Insurance

3. **Request Foreign Travel Liability Insurance:**
   o Visit the CSUF Risk Management website to request foreign travel liability insurance.
   o Access the Risk Management Foreign Travel Liability Insurance Request Portal.
   o Sign in and initiate a "New Form" to begin the insurance request.
   o Accurately complete all fields, ensuring no missing information.
   o List all locations and dates, including flight layovers, under the "Destination" section.
4. **Align Travel Insurance with Concur TR:**
   o Ensure that all travel dates and locations on the Foreign Travel Liability Insurance request match those in the Concur TR.
   o If the information doesn't match, contact the appropriate department for assistance: for insurance adjustments, reach out to foreigntravel@fullerton.edu, and for Concur-related issues, contact your department's Concur travel contact or visit the Accounts Payable and Travel website.
5. **Understand Insurance Coverage:**
   o Please note that Risk Management will conduct risk assessments for travel to locations that the California State University Risk Management Authority and/or U.S. Department of State have designated as "high hazard", "war risk", "Level 3: Reconsider Travel", or "Level 4: Do Not Travel" countries due to the significant safety concerns associated with those destinations.
   o Travel to areas designated as high hazard, Level 3, or Level 4 requires approval from the campus President. For locations designated as war risk, additional approval is required from the Chancellor.
   o Insurance covers up to 14 days of personal travel; any additional personal travel requires coverage by the faculty or staff member.
   o Non-CSUF travelers' insurance premiums must be covered by the faculty or staff member.

Final Approval and Pre-Travel Requirements

6. **Obtain Final Approvals:**
   - Wait for confirmation of TR approval and insurance coverage before travel purchases.
   - Ensure all travel documents (passport, visas, etc.) are valid and up to date.

Post-Travel Responsibilities

7. **Expense Reconciliation:**
   - After the trip, reconcile all expenses using the [Travel Expense Report Guide](#).
   - Ensure all expenses are accurately documented and submitted for reimbursement.
8. **Close Out Your Concur TR:**
   - Use the [Closing Requests Guide](#) to finalize the Concur TR.
   - Verify all documentation is complete and properly closed in the system.

Roles and Responsibilities

- **Traveler:** Ensure accurate submission, compliance with procedures, and timely reconciliation of expenses.
- **Department Concur Travel Contacts:** Assist travelers with Concur-related needs.
- **Department Head:** Review and approve travel requests.
- **Risk Management:** Provide guidance on insurance and risk-related matters. Ensure coverage is secured for all CSUF foreign travel.

For further assistance, contact **foreigntravel@fullerton.edu**.

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