

[THIS IS AN EXAMPLE - Student Organization will receive an link to the following checklist, specifically to their organization's trip, when allocation notification is sent]

2022 Spring - SOTF Post Allocation/ PreTravel Checklist

Organization Name

Trip Name allocate

website to event (if available) allocate

Event Location allocate

Dates of Travel

A copy of allocation notification sent to the organization via VOlink will be included here

Total Allocation: \$----

<i>After allocation notification:</i>	WHO	Link/ Form	Status	Notes	Notes specific to organization/ Notes from meeting
Schedule meeting with SOTF Administrator (Kerri Lovegrove)	Student Org Trip Leader	http://tiny.utk.edu/meetingwithKerri	In Progress/ Partial		
If possible, review and finalize ROSTER - review roster in tab 2 and highlight any additions or changes	Student Org Trip Leader	kerri@utk.edu	In Progress/ Partial	Please review roster in tab 2, roster names that were included with application. Review and highlight any changes or additions	
<i>For meeting be ready to discuss:</i>	WHO	LINK/Form	Status	Notes	Notes specific to organization/ Notes from meeting
How will travel expenses be paid for?	Student Org Trip Leader	to be discussed in meeting with SOTF administrator	In Progress/ Partial	<p>QUESTIONS TO CONSIDER/ INFO TO BE DISCUSSED IN MEETING:</p> <ul style="list-style-type: none"> - Will individual travelers be paying for their own travel costs and need to be reimbursed, post trip? If so, which students? - Is another department/ area on campus paying for part of expenses? If so, SOTF will need to work with that department for organization/ members' Concur travel requests, expense reports and/or an internal transfer. Who is the contact from the other department? - Are Registrations or Lodging not paid yet, and organization would like to discuss the option of having the SOTF travel card pay? (this option's availability is pending payment method required for the event, the timeline of trip, etc.) - Is the organization's OFF campus checking account paying for travel costs and need to be reimbursed? If so, let SOTF admin know in meeting, so that it can be discussed. It is possible that UT Vendor paperwork via Payment Works will need to be sent in order to set up a vendor profile for the organization (if they do not already have one with the university). 	
Fleet Management Vehicle (if applicable)	SOTF Admin (Kerri Lovegrove)	https://fleetmanagement.utk.edu/	In Progress/ Partial	<p>1.) The students eligible to drive a fleet vehicle must create a profile via Fleet Management's website. Instructions in how to do it can be found at https://tiny.utk.edu/SOTFfleetprofile.</p> <p>2.) After fleet profiles are created, please email kerri@utk.edu the type of vehicle(s) the organization would like to be reserve as well as the pick up date AND time, as well as drop off date AND time, as well as who the drivers will be. Kerri will reserve the vehicle with the SOTF account number and a copy will be sent to the trip leaders/ drivers.</p> <p>*** If fleet vehicles was ALREADY reserved PRIOR to allocation notification, under a different a different department's account number, please sent a copies of the fleet reservation confirmation emails to kerri@utk.edu so that SOTF may contact fleet management and change the account number that the vehicles are currently under to the SOTF.</p>	

<i>After Meeting</i>	WHO	LINK/Form	Status	Notes	Notes specific to organization/ Notes from meeting
Pre Traveler Forms completed for all travelers who will need reimbursement	All travelers	sent via Docusign by Kerri Lovegrove	In Progress/ Partial	Once organization's roster is updated/ finalized, SOTF Admin (Kerri) will be send the SOTF PreTrip Traveler Forms to each member via Docusign. Example/ preview of SOTF PreTrip Travel Forms that will be sent to each traveler via Docusign SOTF PreTrip Travel Forms are REQUIRED to be completed by each travel PRIOR TO DEPARTURE (<i>tab 2 of this workbook will be periodically updated to indicate members' completion.</i>)	
Guest Travelers created in IRIS for those not employed on campus	SOTF Admin (Kerri)	IRIS	In Progress/ Partial	To be futher discussed/ explained in meeting with SOTF admin (Kerri). This is dependent on who needs to be reimbursed	
Trips created in Concur for all travelers	SOTF Admin (Kerri)	http://travel.tennessee.edu	In Progress/ Partial	This is dependent on who needs to be reimbursed	
Prior to departure - send finalized itinerary to kerri@utk.edu	Student Org Trip Leader	kerri@utk.edu	In Progress/ Partial	If there is not change to the itinerary submitted with the original application to the SOTF, please email kerri@utk.edu. If there is a new itinerary, please email to kerri@utk.edu	
<i>Upon Return</i>	WHO	LINK/Form	Status	Notes	Notes specific to organization/ Notes from meeting
Post Trip - Trip Report completed with receipts included	Student Org Trip Leader	https://tiny.utk.edu/SOTFPostEventReport	In Progress/ Partial	TO BE COMPLETED POST TRIP; Only one will need to be submitted.	