

Travel & Expense Information for Faculty and Staff

Policies and Procedures



The University of Vermont

VACCINE TESTING CENTER

UVM's Travel Policy & Mini Manual

Web page:

<http://www.uvm.edu/~cntrlrs/?Page=disburse/travel.html&SM=disbursemenu.html>

Travel Mini-Manual:

<http://www.uvm.edu/policies/travel/travel.pdf>

L Drive:

L:\Groups\Medicine\VTC\General Information\Unit Info\Travel Related

Applicability of the Policy

This policy applies to anyone who travels on behalf of the University, regardless of funding source. If travel is being charged to a sponsored project and the terms are more restrictive than those of the University, the terms of the grant or contract apply. Similarly, departments may elect to impose stricter controls over travel expenditures than those required by this policy. If the terms imposed by grants, contracts, or University departments are less restrictive than those of the University, University policy applies.

Basics

Payment Types

- **PUR card (VT tax exempt)**
- **Personal Credit Card**
- **Cash**

ITEMIZED receipts!

No Alcohol!

Meal Rates

- **International: \$90/day**
- **Domestic: \$60/day**

Mileage

- **\$0.535/mile (through June 30, 2018)**
- **\$0.545/mile (starting July 1, 2018)**

Amenity

- A gift item that helps to build, strengthen and promote relationships between the University and external groups or individuals. When traveling abroad, it may be appropriate to bring a gift or amenity to a host or host family

Details

Delegates

If you have a delegate arranging your travel and/or handling reimbursement, **it is ultimately your responsibility** to know what and when tasks should be done and coordinate/communicate with the delegate to ensure everything is taken care of expediently.

Before the Trip - General

- Regarding all pre-travel purchases, traveler should clarify/communicate **funding source**
 - Obtain necessary guidelines/restrictions from sponsor/host
- For international trips:
 - Passport:
 - **up to date** (not going to expire before, during or 6 mos. after travel)
 - **enough pages**
 - Visa: it is your responsibility to **obtain a cashier's check or other visa payment**

Before the Trip – International Travel

- One to two months prior:
 - Once certain of travel dates, **purchase ticket** and **book hotel**
 - Apply for **Visa** if required (paid airline ticket to/from is often required)
 - Complete a required **Travel Authorization**
 - Complete a **cash advance** if needed
 - Communicate with clinical and lab teams on supply transport needs
- Two weeks prior:
 - Review all **security policies and procedures** (iSOS, State Department, Internal, etc.)
- Two to three days prior:
 - Obtain **travel packet** (or print out your own travel related-documents)
- One day prior:
 - Check for **flight delays** and **plan accordingly**
 - **Finalize any last minute changes/concerns**

Travel Authorization Policy

1. Travel Authorizations are required when requesting cash advances. If a cash advance becomes delinquent, the employee will not be allowed to take out additional advances until all their delinquent advances are fully collected and/or accounted for and reconciled.
2. The University requires anyone traveling outside of the United States or Canada to complete a Travel Authorization form in PeopleSoft. Use the comment field to specify location and dates of trip.

It is the traveler's responsibility to ensure this has been completed/submitted.

Fly America Act

- **International airfare purchased with federal GCA01 project.**
- **Travelers must use U.S. airline for all air travel and cargo transportation funded by US government**
- **Cost and convenience irrelevant.**
- **Familiarize yourself with the act and UVM policies.**

http://www.uvm.edu/~cntrlrs/disburse/flyamerica_uvm.pdf

Before the Trip- Domestic Travel

- One month prior:
 - Once certain of travel dates, **purchase ticket** and **book hotel**
 - Complete a **cash advance** if needed
 - In which case, complete a required **Travel Authorization**
- Two weeks prior:
 - Review all **travel related documents**
 - Review all **security policies and procedures** (iSOS, Internal VTC, etc.)
- Two –three days prior:
 - Obtain **travel packet**
 - **Finalize any last minute changes/concerns**

All Travel – Receipt Requirements

- **Itemized receipts required in most circumstances** (original, scanned, or digital + itemized and summary slips)
- **No alcoholic beverages**
- Keep a copy of **conference brochure, agenda, etc.** (give to delegate)
- **Missing receipts** must be obtained by traveler (not delegate)
- **No receipt, expect no reimbursement** (may be deducted from expense report)
- **Tips for meals and ground transportation** are allowed up to **20%**.
- **Tips for bellhops, housekeeping** are *not* reimbursable

All Travel - Reimbursements/Expense Reports

- Sign up for **Direct Deposit**
- **Submit Expense Report** within **60 days** of trip end date
- **Create from Travel Authorization** (if international and/or cash advance)
- **Attach receipts, conference information, map, etc.** (or provide to delegate)
- **Signatures** of traveler & approver (review report)
- **Submit electronic and hard-copies** (delegate)

- **NOTE: If UVM reimburses for something, it then becomes university property/responsibility.**

Business Meals

Policy Elaboration

Categories of Expenditure

Business Meal: A meal attended by faculty, staff, students, non-University personnel, and official guests of the University, for which the primary purpose of that meeting is to conduct University business. Business meals may occur while away from campus on travel status, or locally with consultants, academic collaborators, recruits and others with official University relationships. The main focus of the activity is University business and consumption of food is incidental to the purpose of the meeting.

Policy Statement

Business Meal, Hospitality and Amenity

Any University business meal, hospitality or amenity expenditures must have a clear business purpose which advances the University's mission, must be reasonable in amount, and appropriate under the relevant circumstances. The person(s) responsible for the expense is responsible and accountable for ensuring compliance with this policy and appropriate federal, state, and local guidelines.

<http://www.uvm.edu/policies/procure/businessmeals.pdf>

Policy Criteria

- On-campus whenever possible
- During normal business hours
- Limited in scope and frequency
- Responsibility is on payee to submit required documentation

- Required documentation for business meals:
 - ✓ Document purpose of meeting
 - ✓ List of names of attendees
 - ✓ Time and place
 - ✓ Itemized receipt

Security

Reasoning:

- Anticipate and respond to natural and/or man-made crises
- Concern for the health, safety and well-being of faculty and staff
- Limiting legal liability for university
- To prepare an organized & coordinated response (internal, UVM, media)
- Respond to ongoing targeting of Americans abroad
- Ensure all staff & faculty travel in safest manner possible

Before your trip:

- Review all travel preparation documents
- Travel Authorization (International)
- Check in with Emergency Response Team (ERT) to discuss conditions
- Address communication procedures (phone, internet, apps, VPN, etc.)
- Review alerts for your destination
- Learn about the local situation and how best to respond in case of emergency (natural or man-made)

UVM Recommendations

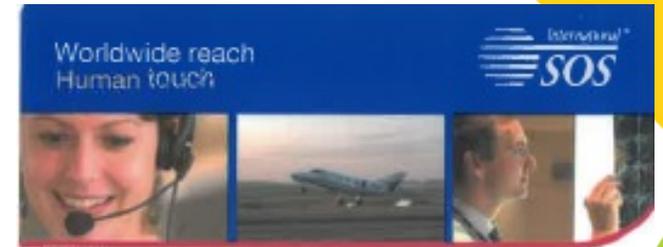
- Review checklist (linked below)
- International travelers register with:
 - iSOS
 - State Department STEP Program
- Review CDC website for requirements and advisories
- Confirm adequate insurance coverage
- Visit travel clinic for necessary vaccinations and travel medicine
- Address technology security (device and data) and network access
- Review customs restrictions

International Travel Preparation Checklist

<http://www.uvm.edu/~cntrllrs/disburse/Intrntl%20travel%20checklist.pdf>

Internal Recommendations

- Check in with the Emergency Response Team (ERT) team prior to your planned travel
(Mary Claire, Marian, Megan)
- Familiarize yourself with your itinerary and assess risks
- Be aware of you surroundings and avoid areas at risk
- Follow agreed upon security measures at all times
- Check iSOS and State Dept. updates regularly
- Carry wallet card and secure your phone at all times
- Download recommended apps (Megan can help)
- Know the local authorities/entities who can help and how to contact them



University of Vermont
Scholastic Comprehensive Membership
11BSGC000020

i-SOS (Collect): UVM #11BSGC000020

From US, Central & South America: +1-215-942-8226

From Canada: 1-800-441-4767

From Europe, Eurasia, Middle East, Africa: +44-20-8762-8008

From Asia, Pacific Rim, Singapore: +65-6338-7800

US State Department (Collect):

From Overseas: +1 202-501-4444

From U.S. & Canada: 1-888-407-4747

Emergency Procedures

EMERGENCY PROCEDURES:

- 1) Move to a safe location if possible
- 2) Contact I-SOS (phone, text, email)
- 3) Contact local authorities (apprise them of situation and location)
- 4) Contact VTCeRT (see below)

VTC Emergency Response Team (VTCeRT): Contact by phone or email (in the following order):

Mary Claire Walsh: maryclaire.walsh@med.uvm.edu; (C) 802-989-9044 / (W) 802-656-7764

Megan Barnes: megan.barnes@med.uvm.edu; (C): (802)363-5276 /(W) 802-656-1121

Marian Miller: marian.e.miller@med.uvm.edu; (C) 802-522-5776 / (W) 802-656-7768

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