

UNIVERSITY OF MIAMI



Origination:	04/2021
Effective:	04/2021
Last Approved:	04/2021
Last Revised:	04/2021
Next Review:	04/2023
Owner:	<i>Humberto Speziani: Assoc. VP, Business Services</i>
Area:	<i>Business Services</i>
References:	
Applicability:	<i>University of Miami System-Wide</i>

Travel Policy

COVID-19 University Travel Guidance and Requirements - All University-related travel must receive prior approval by the faculty or staff member's supervisor and the supervising dean or vice president. For faculty, approval must also be received from Faculty Affairs and must comply with University quarantine and testing requirements upon return for both domestic and international travel, including the "Return to Work Attestation." Click [here](#) to review the full COVID-19 travel guidance and requirements.

PURPOSE:

The policy establishes the [University of Miami Travel Portal](#) as the University's travel management solution for all University funded travel. The University Travel Portal provides guidelines for University travel bookings, which ensures the duty of care of those traveling on University business while complying with external and internal travel requirements.

SCOPE:

The scope of this policy applies to all University employees, faculty, students, and other University associates who travel or book travel on behalf of the University, irrespective of payment method or funding source (i.e., operating budget, grants, gifts). To support the University's Duty of Care responsibility, it should be aware of all business, education and research related travel in case of emergency situations and to provide necessary coordination and assistance. Individuals traveling on official University business are responsible for complying with these procedures and are expected to be financially prudent and reasonable with their travel expenses. Athletic travel, including team charters, are excluded from this policy.

POLICY:

Necessary-consideration should be given to utilizing more cost and time effective means of conducting business such as teleconferencing and web-based meetings. For conferences and similar meetings and when not accessible in an online format, the travel should be discussed and authorized by the supervisor prior to making travel arrangements. When business travel is required and authorized, airfare reservations must be made through the [University of Miami Travel Portal](#) to comply with this policy.

University travel restrictions may prevent travel to certain locations or to any location. When traveling to or from certain locations, precautionary measures may be required including self-quarantine and/or testing. Travelers must comply with University requirements to protect themselves and others.

All faculty, staff, undergraduate, graduate, and professional students traveling on University business, conducting research, representing the University (e.g., extracurricular activities, attending academic conferences), and/or using University funds (including operating budget, gifts, or grant funds) are required to register their travel itineraries and contact information in the University's Travel Portal.

The University requires Travelers to document a business purpose and secure approval from appropriate supervisor(s) prior to committing University funds or incurring expenses. Furthermore, Travelers are to exercise prudence when making travel reservations by always selecting the lowest fares available.

Travelers are responsible for understanding and adhering to specific restrictions imposed by the source funding the travel. Any travel requirements from the granting agency supersede what is outlined in this policy.

The University of Miami Travel Portal is the University's official and required travel management service for Travelers and designated Travel Assistants. Special University negotiated rates for air travel, car rental, and lodging are available through the Travel Portal. Use of the University Travel Portal supports the guiding principles to spend appropriately and supports the University's Duty of Care responsibility for all Travelers.

The [University Travel Card](#) is the university's preferred method of payment, but the same policy must be followed in the case of reimbursement payment to the Travelers.

The [Fly America Act/Open Skies Agreement](#) requires all flights charged to federal awards be booked with U.S. flag air carriers.

It is expected that there will be no exceptions to the University's Travel Policy, which are designed to support the University's Duty of Care and financial stewardship responsibilities and assure compliance with University policies and governmental requirements. Any request for exception based on extraordinary circumstances must be approved, in advance of the travel, by an Executive Vice President or designee. Expenses submitted for reimbursement which are deemed to be in violation of this policy may not be reimbursed to the employee/Travelers.

For business expenses including meals and entertainment, see [Electronic Travel & Business Expense Reimbursement Policy](#).

DEFINITIONS:

Allowable Expense: A necessary, reasonable, and appropriate expense incurred for the primary benefit of university business and therefore permitted to be reimbursed or directly charged based on the permission of the university or by the terms of federally or private sponsored agreements.

Companion: Refers to a dependent, domestic partner, other family members, or any other individual accompanying an employee or authorized person who is conducting business on behalf of the University.

Concur: A self-service online booking tool that can be accessed through The University Travel Portal.

Domestic Travel: The General Services Administration defines domestic travel as travel within the United States, its possessions and territories. U.S. possessions and territories include Guam, American Samoa, Puerto Rico, and the Virgin Islands.

Foreign/International Travel: Travel outside of the United States, its possessions and territories. This includes travel within the United States while in route to or returning from foreign destinations.

Group Travel: For airfare Group Travel is when 10 or more people are all traveling together and must be booked in the same reservation.

Guest: A function on the University Travel Portal that allows employees or students to book travel for a Traveler that does not have a travel profile or has not assigned the booker as their Travel Assistant.

Local Travel: Travel within Miami-Dade, Broward and Palm Beach Counties.

One-Way Rentals: Automobile rentals returned to a location other than origin. These types of rentals may carry an additional fee or drop off charge imposed by the rental company.

Preferred Vendors: Air, hotel, and car rental companies of which the University has negotiated corporate rate.

Profiled Travelers: A University of Miami employee or student who has completed their travel profile on The University Travel Portal.

Travel Assistant: A function on the University Travel Portal which allows employees the option to book travel as another profiled traveler through Concur or a Travel Inc, without having to book as guest.

Travelers: University employees, faculty, students, companions, consultants, job candidates, guest lecturers, University fellows and residents, and other non-employees/Travelers that require travel for a University purpose.

Travel Incorporated: The travel management company (TMC) contracted by the University, responsible for assisting with booking air, hotel and car rental arrangements consistent with this Travel Policy. Travel Incorporated primary purpose is to assist with the needs of employees and students traveling on company business or personal reservations.

Travel Management Department: The University administrative department responsible for the travel guidelines outline in this Travel Policy. It manages the contractual relationship with the Travel Incorporated and University Travel Portal.

University: University of Miami and its affiliates

University Funds: Includes all source of funds under the University financial responsibility including operating, gifts, and grants.

University Travel Portal: The University's primary tool for ensuring a managed travel program. Through the portal, University Travelers, Travel Assistants, and students can take advantage of both Concur and Travel Incorporated agent support to make airfare, car rentals and hotel business travel reservations.

University Travel Card: The preferred method of payment for University business travel.

PROCEDURE:

AIR TRAVEL

All airfare paid by University Funds that is an Allowable Expense must be booked through the [University of Miami Travel Portal](#). Faculty, staff and students may book online through Concur or through a Travel Incorporated agent in order to comply to this Policy.

Travelers or their designated Travel Assistant should make all reasonable efforts reserving the lowest available fare within two hours of the desired departure or arrival time.

When booking through the University online portal, Concur, or with a Travel Incorporated agent, the Lowest Logical Fare ("LLS") at the time of the booking will be offered. Travelers are expected to make

reservations within the lowest airfare available threshold of \$200. If the Travelers finds a lower fare, not offered on the University Travel Portal, he or she should contact Travel Incorporated immediately for price-match assistance. If the lower fare is available, Travel Incorporated will book the reservation, at no extra cost.

The University Travel Portal includes all ticket class options. An appropriate business reason will be required when booking:

- Airfare that is \$200 over the lowest logical airfare
- Premium Economy/Comfort Plus ticket for flight under 4 hours
- First Class/Business Class ticket for flight under 8 hours

Bookings which are not the lowest airfare available or \$200 within the lowest logical airfare requires selection from the dropdown menu and justification text box at the end of your booking.

Basic Economy options are available on the University Travel Portal and are considered within Travel Policy when the airfare is within \$200 of the lowest logical airfare. It is important to note that selecting Basic-Economy class option while not restricted from purchase, is not recommended by the University due to being highly restricted by the Airline industry. Most Basic-Economy purchases result in a Non-Refundable and Non-Exchangeable Air Ticket.

Business trips normally commence one day before the conference/meeting and end when the conference ends. If no flights are available when the conference ends or overnight stay is required due to unreasonable flight hours, the University may reimburse the traveler for expenses up to one day after the conference end date.

When booking a flight that is extended for personal travel, a comparison non-refundable coach fare quote with the equivalent dates of travel for business being conducted is required. Airfares submitted with an additional leg of travel not related to business, must be accompanied by an equivalent non-refundable coach fare quote for the most direct route to the business destination obtained at the time of booking. Reimbursement is limited to the lesser airfare amount. Inability to provide a comparison quote will result in denial of reimbursement.

Airline Frequent Flyer Programs: University Travelers can earn airline points for business travel if their frequent flyer numbers have been added to their travel profile or at booking.

Alternative Routing/Airports: Alternative routing/airports should be considered when resulting in lower air fare.

Connecting Flights: Connecting flights should be considered if fare savings exceeds \$200 and does not increase travel time by more than two hours or if no other flight is available.

Baggage Fees: Standard airline charges for baggage are approved. For further clarification on approved excess baggage charges Travelers are to refer to the University Travel and Business Expense Reimbursement Policy. Baggage not included in tickets purchased in the University Travel Portal would need to be purchased directly through the appropriate airline.

Cancellation: Any flight cancellation as a result of the airline. The Traveler should contact the airline or travel agent for a flight alternative.

Unused Airline Tickets: It is the Traveler's responsibility to notify their supervisor and/or department head when an airline ticket resulted in an unused ticket and remains unused regardless of reason.

All Tickets booked through The University Travel Portal or Travel Incorporated, and not used, will automatically be associated to the Traveler's profile to be applied towards the next flight reservation if all rules are applicable and with the same airline is being used. Travel Incorporated can assist Travelers with applying unused airline tickets. Unused airline tickets are non-transferable and therefore, they can only be reused on new flight reservations for the original Travelers. Depending on the Airline additional fees to utilize unused tickets may be applied to the new transaction and the travel Agent will facilitate with their expertise in making the most cost-effective new reservation when applying unused ticket.

Travelers are encouraged to rebook unused tickets whenever possible for future University travel. Typically, airlines will allow the credit and associated fees from an unused ticket to be applied to a future trip within 12 months. Faculty, staff and students should notify the Department of Travel Management if unused tickets will not be used prior to the expiration date. The Department of Travel Management will assist when possible to transfer the tickets, if applicable, to another University business traveler. The unused ticket may not be used for personal travel.

Group Travel: When 10 or more individuals are traveling together and must be booked in the same reservation, bookings must be made directly through a Travel Incorporated agent. Complete the [Group Reservation Form](#) and submit to travel@miami.edu.

LODGING

Hotel Reservations and Cancellations: Hotel reservations may be conducted using the University Travel Portal. The University Travel Portal will display University negotiated hotel rates in addition to Travel Agency negotiated rates. A travel agent may aid with hotel bookings and reservations shall be made at the lowest rate available for the planned itinerary. Hotel cancellations must be addressed as soon as changes are known and communicated to Travel Incorporated. Hotel cancellation charges and processing fees may be charged accordingly.

If a University Traveler is traveling to a conference that is offering a hotel conference rate, Travelers are encouraged to book through this option without the need to use the University Travel Portal.

Hotel Class: University negotiated hotel corporate rates as well as Travel Incorporated hotel rates can be easily accessible on the University Travel Portal for reservations. South Florida or adjacent locations to University campuses for which there may not be negotiated corporate rates available, Travelers may contact the University Travel Management department for assistance. A complete list of corporate negotiated hotels rates can also be found on the [Travel Management](#) website.

Airbnb: University employees are authorized to use Airbnb for business if stays are four (4) days or longer if more affordable than hotel lodging. Students are NOT authorized to use Airbnb and must reserve lodging accommodations with a hotel when traveling on behalf of the University. Airbnb bookings may be reserved outside of the University Travel Portal. For exception requests, Travelers must contact the Risk Management Department at (305) 284-3163 or email: riskmanagement@miami.edu.

CAR RENTAL

Preferred Car Rental Company: The University's preferred car rental companies are available on the [UM Travel Management website](#) and they are required to provide contracted rates, insurance coverage and roadside assistance without additional charge. The preferred car rental companies are available in the University Travel Portal for reservation.

Car Reservations: Before renting a car, the Travelers should consider other less costly available means of

transportation, (e.g. shuttle services, ride services, carpooling, and taxis). It is highly recommended that car rental reservations be made using the University Travel Portal which hosts University contracted rates. For agent assistance, Travelers or Travel Assistant may contact Travel Incorporated.

Car Rental Class: Compact or mid-size cars should be rented whenever possible. Additional vehicles types and sizes may be rented as necessary for business travel related purposes. Cars should be returned with a full tank of gas to avoid unnecessary surcharges for fuel. Truck rentals are not available through The University of Miami Travel Portal.

Motor Vehicle Request (MVR): Any student or employee who needs to drive a University vehicle or a rent a motor vehicle for University business purposes, must contact the office of Risk Management and follow the required process to obtain [Motor Vehicle Request \(MVR\)](#) approval.

Student Drivers: Students with a valid driver's license who need to drive for official University business can take advantage of car rental discounts. Each student driver is responsible for ensuring that he or she adheres to state, local and car rental age restrictions, and laws.

Car Rental Insurance: The University requires all car rentals for the purpose of business travel, be insured. If the car rental is with a [preferred car rental company](#) the rates are inclusive of insurance when renting in the United States and Puerto Rico. If renting internationally or with a vendor that is not a preferred company, Travelers must purchase CDW/LDW (collision damage waiver/loss damage waiver) and basic liability insurance directly through the rental company. Rental Insurance cannot be purchased through the University Travel Portal or Travel Agent, purchase should be at the time of pick-up or by contacting the car rental company.

The Traveler is responsible for purchasing insurance for vehicles rented for personal or leisure use. When renting for personal/leisure use the renter assumes responsibility for all loss or damage done to the rental vehicle, up to and included the full value of the rental vehicle, regardless of fault.

Reporting an Accident: Regardless of fault, any employee involved in an accident while driving a vehicle rented for University business must immediately report the accident to the local police and rental agency as well as UM Risk Management at (305) 284-3163 Email: riskmanagement@miami.edu

Ground Travel: While traveling, it may be necessary to use multiple modes of ground travel (Taxi, Shuttle, Limo). In these cases, Travelers should exercise reasonable judgement and either use a University preferred supplier or the most economical ground travel option available. Travelers may use other services while best judgement to ensure their safety and that of others traveling with them.

INTERNATIONAL TRAVEL

Booking: International Travel can be accommodated online through the University Travel Portal or through a Travel Incorporated agent. Travelers or Travel Assistants should ensure that they have reviewed the [International Travel Approval](#) policy and received the proper approvals prior to booking. The University Travel Portal houses helpful links such as the US Dept of State Travel Warnings and passport/visa assistance.

International SOS: The University has a Global Assistance Program, providing its international and domestic Travelers with medical, security and travel assistance, managed and administered by International SOS (ISOS). Travel itineraries, whether for international or domestic travel, booked through the University Travel Portal will be directly uploaded into the ISOS program on behalf of the Travelers for Travelers.

BOOKING FOR OTHERS

University employees that are authorized to book travel for others, should book travel according to this policy.

Booking for profiled Employee or Student: All University employees and students have access to complete a Travelers profile on the University Travel Portal. When an employee is booking travel on the University Travel Portal for another employee or a student, they must book in one of the following ways.

Travel Assistant Function: This is the preferred and safest method to book travel for another employee or a student. To access this function, the traveling employee or student must designate their booker as an approved Travel Assistant prior to booking. This will allow the Travel Assistant to book travel as the Travelers and give the Travelers access to his/her itinerary and unused tickets if applicable.

Share an Itinerary: This function should be used when a traveling University employee or student would like to share their existing booking with another employee or student for the same arrangements to be booked. The employee or student without an existing booking, may then copy that itinerary to make their own arrangements. Please note, all Travelers will need to have completed their travel profiles to have access to this function.

Book for a Guest: This function may be used when there is not enough time or availability to use the previous two functions. The Travel Assistant may use the Book Guest or Add Guest when booking other employees or students travel who have not completed their travel profiles and are therefore not a profiled employee or student. In this function, bookers are expected to correctly indicate the Travelers as an employee or student and must be aware that the booking will not be connected to the individual's travel profile.

Companion: In general, the expenses of a spouse, family member, or other person accompanying the business Travelers are not payable using University Funds. Such expenses are only payable if the accompanying person has a position with the University and is traveling to make a significant contribution in furtherance of University business. University employees may use the add guest function on the University Travel Portal or book through a Travel Incorporated agent.

Non-Employee: University employees may book travel for non-employees who's travel arrangements will be paid by the University, through the University Travel Portal or Travel Incorporated Agent. To book this travel using the University Travel Portal, the Travel Assistant must select the guest or add guest option.

University Resident and Fellows: Residents and Fellows at the University do not have access to the Travel Portal. However, University employees may choose to book their travel by booking through the guest or add guest function.

Attachments

No Attachments

Approval Signatures

Approver	Date
Stephanie Linares: Asst. Director University Compliance Services	04/2021
Brandon Gilliland: Vice President & Chief Financial Officer	04/2021
Humberto Speziani: Assoc. VP, Business Services	04/2021
Yanay Tabraue: Sr. Executive Assistant	04/2021

Applicability

University of Miami, University of Miami Ambulatory Care Surgery, University of Miami Hospital and Clinics, University of Miami Laboratories, University of Miami Medical Group

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