

Guidelines/FAQ's Re: COVID Impact to Travel and Prof. Development Expenses

Context: The policy below was communicated to the UP campus in early March, and in the weeks following this announcement there have been numerous questions regarding how to handle travel credits, externally funded travel, personal reimbursements, etc. Below are guidelines and FAQ's developed by the financial affairs division to provide clarification to faculty and staff.

University of Portland Novel Coronavirus (COVID-19) Outbreak Travel Policy

Effective: March 11, 2020, Until Further Notice

Last Amended: March 19, 2020

Policy Owners: Provost and all University Vice Presidents

A. Introduction

To promote the health and wellbeing of University of Portland community members during the ongoing novel coronavirus (COVID-19) outbreak, the University is adopting this policy concerning travel by UP students, faculty, and staff, effective immediately until further notice.

B. University of Portland-Sponsored and/or -Reimbursed Travel

Until further notice, all University of Portland-sponsored and/or -reimbursed travel must be postponed or canceled unless written exception is granted. Such written exception may only be granted by the Provost (in the case of travel related to the University's academic division) or by a relevant University Vice President (in the case of all other University-sponsored and/or reimbursed travel).

Here are guidelines and FAQ's to assist with answering common questions:

Guidelines Regarding Travel and Professional Development Expenses:

1. All non-essential travel for students, faculty, and staff should have been cancelled in March 2020 per the policy above, including airfare, conference registration, lodging, transportation, or other trip related expense. This pertains to all expenses charged to university p-cards, an employee's personal credit card (for expenses eligible for reimbursement), or for other pre-paid expenses.
2. In some cases, a business trip that was intended to occur during FY21 (after July 1) had been scheduled and pre-paid during the current FY20. If the trip has not yet been cancelled by the host organization (perhaps is scheduled far enough in the future where there is a possibility it may be held as planned), then it is not necessary to cancel that travel at this time. However, the above travel policy remains in effect until formally amended or lifted by the university administration, which means no institution sponsored travel should occur unless an exception is granted.
3. Any approved exception to the policy should be documented and forwarded to the Financial Affairs division, Controller's office. Please send to up_controller@up.edu and cc: budget@up.edu emails.
4. For airfare credits, the Controller's office will make available for appropriate Director/Dean/Manager a listing of "COVID Travel Credits" to list details by unit for travel that had been purchased to occur on or after 3/1/20. The listing will be made available on the

Budget Administrators-Teams site. It is the responsibility of each unit to monitor airfare credits to the extent:

- a. Please make every attempt to work with airlines to utilize credits to cover employee travel, this may involve requests to extend the redeemable time period (due to conference location/date scheduling parameters), or request to transfer credits to other departmental employees depending upon situation;
- b. Credits are applied toward the individual's future university approved travel (at such time when the university returns to normal operations);
- c. Directors/Deans/Managers will be expected to monitor status of airfare credits for employees in their units. The "COVID Travel Credits" listing will include travel itineraries by individual with departure date of 3/1/20 or later and the **expectation will be for departments to input status (notes) regarding each trip.**
- d. In the case where the credit cannot be used on a future university business trip, or transferred to another employee, and the employee would like to use the credit for personal use, then the employee needs to reimburse the university for the value of the credit being used.

When the above options are not feasible or applicable, then the cost of the airfare will be considered a foregone expense. Please ensure sufficient notes are included in the "COVID Travel Credits" tracking list.

1. Professional Development expenses other than travel-related as noted above, such as webinars, books, dues, or other expenses related to enhancing an employee's professional knowledge should follow existing procedures for appropriate budget and supervisor approval in advance.
2. These guidelines may not cover every unique situation, therefore, please contact the Controller's office at up_controller@up.edu if you have additional questions.

FAQ's:

1. Can students travel in the Fall if they graduated in May 2020 and their conference has been rescheduled to a date after their graduation?
[No, the student will no longer be eligible to have their travel sponsored by the university.](#)
2. Can conference registrations be donated to the sponsoring organization rather than request a refund?
[No, the university is looking for all opportunities to recover expenses to mitigate the financial impact resulting from the COVID situation.](#)
3. Can unused professional development funds be carried forward to FY21?
[No, there is no carry forward of departmental professional development budgets to FY21.](#)
4. How do we proceed with travel credits for students and guests? [See #4 in the guidelines section above regarding travel credits.](#)
5. Are we allowed to travel during the travel ban if we have funding from a grant or other third-party entity?
[Assuming travel is permissible per federal regulations, and with appropriate supervisor's approval, an employee may travel if all expense is covered from an external grant or third-party entity.](#)
6. If a faculty member had to cancel a flight, and they have a travel credit, can that credit be added on top of their new fiscal year professional development allotment?
[No, the travel credit would count toward the faculty member's FY21 professional development allotment. If it's not feasible for the travel credit to be applied, then it is the responsibility of the dean to ensure the process in #4 of the guidelines above is followed.](#)

7. If someone has a travel credit from an airline, and the employee wants to go to another conference in the next year, what do they do if that airline doesn't fly to their destination? (applies to all business-related travel with similar circumstances)
[See #4 in the guidelines section above.](#)
8. If a faculty member purchased airfare for a student with Student Development funds, and they had to cancel that flight (that student never travels) what happens to the travel credit?
[Travel credits awarded individually to a student may not be recoverable by the university \(unless airfare was purchased as transferrable, such as in Athletics\). If it is not recoverable, then it will be considered a foregone expense.](#)
9. If I booked a \$200 conference flight and a \$300 personal flight, I have \$500 of credit. If I then buy a \$500 ticket to a conference next year, how do I get my own \$300 back?
[Provide documentation of the original purchase transactions, plus documentation of the new trip expense to show how much was covered by personal funds; attach documentation to the expense reimbursement form and submit to the controller's office.](#)
10. Does the university's travel ban announcement apply to Butine funded travel?
[Yes, the travel ban applies to Butine funded travel which should be cancelled or postponed until further notice per the policy.](#)