Student Travel - Guidelines and Requirements

Pre-Travel Authorization

Why do you need Pre-Travel Authorization

Travelling employees must begin the travel planning process by notifying their relevant signing authority and then filling out a Pre-Travel Authorization Form. **!This should be done well in advance of travel and before expenses are incurred!**

Pre-Travel Authorization is required by the ORSCE for several reasons. It is used to check if the funds being requested are available in your research account and can cover the estimated expenses, and that the travel is relevant to the purpose for which the funds were awarded. It's also important because a risk level is ascribed to the travel, which will inform decision making later on in the travel planning process.

Filling out Pre-Travel Authorization

You will be asked to state the following in the Pre-Travel Authorization

- Purpose of Travel
- Destination and duration of travel
- Budget and possible exceptions to it
- Mode of transportation
- Risks
- Relation to grant

When filling out the form, you will be asked to assign a risk level to your travel. To accurately assign a risk level, please perform a Risk Assessment

Chrome River is used for all pre-travel authorization and the majority of expense reimbursements. To login into Chrome River, go to the google app icon on the top right of either your gmail or google dashboard and scroll down to the bottom and click on the Chrome River icon. Login in using your MRU credentials.

Risks While Travelling with Students

High Risk vs. Low Risk Travel

It is important to know the differences between high-risk and low-risk travel when filling out the Pre-Travel Authorization Form

Low-risk: Any travel that entail hazards no greater than what will be encountered on campus during everyday activities.

High Risk: Travel that has the potential to expose participants to situations that entail hazards greater than would normally be found during every day campus activities

Factors that could lead to high-risk activities include travelling to remote or isolated locations, overnight stays in the wilderness, areas prone to natural disasters, or travelling to locations where health advisories have been issued, to name just a few. A full list can be viewed here.

!Any travel that involves a student outside Canada and the Continental US is automatically a High-Risk activity!

Preparation for High-Risk Travel

Travel preparation for low-risk activities is fairly simple. Only a risk assessment is required and once it is shared with your faculty/department head, and the Pre-Travel form has been acknowledged by ORSCE, you are ready.

If the travel was determined to be high-risk by the risk assessment, more planning is required. Consultation with Risk Management Services is required for high-risk travel. They will review your risk assessment, and you will need to complete an Off-Campus Activity Form One - Safety Planning Record. This document is signed by Risk Management and then shared with your faculty/department head.

!Important Note: A Form One must always be completed for high-risk activities and must be submitted to Risk Management at least four weeks before the activity start date!

Students participating in off-campus activities must always fill out the Acknowledgment of Risk form, even for low-risk activities. This does not need to be submitted to Risk Management. Supervisors/PIs also should provide orientation to students before travelling. Students need to inform their supervisor about any special needs whether that be dietary, medical, or something else.

Here is a checklist for getting approval on High-Risk travel:

- Supervisor/PI informs proper authorities of intention to travel
- Supervisor/PI fills out pre-travel authorization
- If the travel is identified as high-risk in the pre-travel authorization, supervisor/PI informs Risk Management Services and consults with them
- Risk assessment is carried out and/or reviewed by Risk Management Services, consulting experts if needed
- Supervisor/PI fills out Form One and has it signed by Risk Management Services
- Supervisor/PI informs department/faculty head that their travel activity has been deemed high-risk and sends them the signed Form One, which is reviewed.
- If the department/faculty head identifies unmanageable risks that cannot be mitigated then the event is cancelled. If no unmanageable risks are found or they are accounted for and corrected, then the event planning can begin, with the supervisor/PI booking things like accommodations, airfare, etc.

Serious Incidents While Travelling with Students

Types of Incidents

An incident is any event during travel that has the potential to disrupt the continuation of the travel activity. This can be split into **non-critical incidents** and **critical incidents.** Critical Incidents jeopardize or outright halt the continuation of travel, while non critical incidents can be dealt with in a short manner of time allowing travel activities to continue. Examples of each are listed below.

Critical Incident: serious injury, assault, fatality, significant political unrest, natural disaster, etc.
Non-Critical Incident: minor car accident, theft, minor injury that doesn't hinder the continuation of travel, etc.

Communication During Serious Incidents

In the case of off-campus emergencies, Form One will contain all necessary emergency contact information for the participants. If an emergency occurs, the supervisor/PI must contact Security Services to notify them.

Security Services will then contact the Emergency Operations Centre, which will coordinate efforts to get participants to safety and communicate with the participants.

The supervisor/PI is responsible for contacting emergency services in the area and MRU Security Services unless otherwise incapacitated.

In the case of an incident occurring off-campus, upon the safe return of the participants, the supervisor/PI must fill out Off-Campus Activity Form Three - Incident Report. This report must be completed and sent to department/faculty head within 72 hours of the event ending. The supervisor/PI must also give students the opportunity to provide a debrief of the travel through Form Two.

Student Insurance

The supervisor/PI is responsible for ensuring student participants have adequate insurance coverage while travelling.

If the traveller is a student the supervisor/PI needs to follow the guidelines below.

Ensure the student has travel coverage through the MRU student insurance provider or have the student provide documented proof of equivalent coverage for duration of travel. Contact Risk Management Services prior to travel for more information on necessary coverage.

Travel Expenses and Reimbursement for Students

How to Reimburse Students

Students will undoubtedly incur expenses while travelling for university business. It is the responsibility of the supervisor/PI to inform the student travelling of the expenses that will be reimbursed and the process for obtaining reimbursement. **!Before travel, it is considered best practice for the Principal Investigator to handle their students pre-travel authorization and submit just one request for both parties. However, in some cases if the student is an employee, the student can submit their own pre-travel authorization!**

Important Note: Non-employees cannot access Chrome River, so while RAs can access Chrome River, a student who is not an employee will not be able to make use of Chrome River at all. RAs are employees of Mount Royal University.

Below are the four most common scenarios encountered when reimbursing a student for their expenses. This will also lay out the steps the supervisor/PI needs to take to ensure their student is compensated in those scenarios. If in doubt about how to proceed contact orscefinance@mtroyal.ca.

1. **The student is an RA and their supervisor/PI paid all of their expenses while travelling:** The supervisor/PI will have two entries in their expense report for each type of expense (hotel, airfare, conference registration etc.). One for them and one for the student. The supervisor/PI needs to attach receipts to each expense and have the RA send an email to them confirming and acknowledging that it was the supervisor/PI that paid all expenses. This correspondence will be uploaded alongsidethe expense report.

2. **The student is an RA and their supervisor/PI didn't cover all the student expenses**: For expenses that the supervisor/PI didn't cover, the student must file their own expense report to be reimbursed. This will be done through Chrome River. Because the student is an RA, they are considered an employee and can log on to Chrome River. The student follows the normal expense/reimbursement process and adheres to the guidelines from the travel and expense procedure (per diem meal allowance, etc.).

3. **The student is not an employee and their supervisor/ PI covered all their expenses**: Essentially the same as scenario one even though the student is considered a non-employee. Supervisor/PI submits an expense report with two entries for each type of expense (one for the supervisor another for the non-employee). The student will send an email to the supervisor/PI confirming and acknowledging all expenses were covered for the student. This correspondence will be uploaded alongside the expense report.

4. **The student is not an employee and their supervisor/PI did not cover all their expenses:** The non-employee must gather their receipts and email the expense reimbursement form (which ORSCE will provide) to the PI, and the PI will authorize and fill out the FOAP on the form for the reimbursement. For funds like URDG and the SoTL Undergraduate Dissemination Fund, send the receipts to ORSCE directly to request reimbursement with the evidence to back up their request. When the completed form has been received and reviewed by the ORSCE, the office will submit a payment requisition form to accounts payable. Payable will reimburse the non-employee.

!Travel expense claims with necessary supporting documentation must be submitted within 10 days of returning from travels, or before the next corporate credit card due date!

!Contact orscefinance@mtroyal.ca if you have any questions about the appropriate way to proceed with reimbursement procedures!

*****For a complete account of all travel related policies at Mount Royal see the Off-Campus Activity Safety Policy + Procedure and the Travel and Expense Policy + Procedure, as well as your faculty's related procedures.***

This document is a guideline to reference when planning for travel, but does not encompass all aspects of the relevant policies faculty need to read and understand before travel.

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