

Title: Herbert Wertheim College of Medicine Travel Guidelines

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SUMMARY & PURPOSE:

Florida International University (FIU) Herbert Wertheim College of Medicine (HWCOC) resources should primarily be utilized to support the mission, vision, and values of the college. This procedure is intended to provide criteria for travel approval and funding reimbursement with a focus on linking the request travel to the goals of the HWCOC Strategic Plan. All travel expenses must be reasonable and necessary, and traveler must use the most cost-effective means of travel. Faculty and staff requesting authorization to travel on official HWCOC business are expected to comply with college and university and state regulations.

SCOPE/APPLICABILITY:

The procedure only applies to faculty and staff of HWCOC requesting authorization for approved travel, as described below (criteria for travel).

PROCEDURE:

Regardless of the source of funding (e.g., FIU, grant, hosting institution or organization, personal funds), all travel requests must be approved through the HWCOC Centralized Travel Procedure, which requires approval by designated travel expenditures supervisor. When submitting a request for travel, the faculty and staff member must provide a detailed cost estimate and identify the category (as listed) in which his or her request falls.

All travel authorization request (TAR) should be submitted six (6) weeks prior to travel. However, in order to capitalize on the the best travel rates and guarantee availability, we strongly encourage submission three (3) months prior to the first day of travel, whenever possible.

Departments are responsible for managing and prioritizing their travel budget according to the criteria stated below. Future travel plans for faculty and staff should be submitted as part of the budget process for review and approval by the Dean.

Faculty need to obtain departmental approval or immediate supervisor prior to submitting an abstract, scientific work or other material to a meeting.

Criteria for Travel

Travel approval to be based on one or more of the following criterias:

1. *Scholarly Activity*

- a. National or international meetings for a professional association, organization, or society in the traveler's field.
- b. Research peer reviewed platform/plenary.
- c. Research peer reviewed poster.
- d. Peer reviewed educational presentation.
- e. Invited educational presentations. The host of the invited educational presentation is expected to cover all or a large majority of the travel expenses.
- f. Potential for increased research productivity such as grant review (study section), NIH program consultation.
- g. Research collaboration and/or enhancing technical capabilities (e.g., learning new laboratory techniques or clinical procedures).
- h. Abstracts that have been approved by the department and immediate supervisor prior to submission.

2. *Professional Development*

- a. Education and training that demonstrates direct benefit specifically related to programmatic goals.

3. *Networking*

- a. Member of a professional association, society, or organization in related field that requires attendance.
- b. Clinical, education, professional or research collaboration.

4. *Recruitment*

- a. Recruitment of students, faculty and staff whose knowledge skills and expertise align with the clinical, education, research, or administrative goals.

5. *Other*

- a. The meeting must be planned with a specific agenda and defined objectives. This category could entail travel related to University/HWCOM efforts in governmental affairs and/or fostering academic collaborations at institutional levels.

Priority considerations:

Priority is given to travel which aligns with the HWCOM Strategic Plan goals.

1. *Education and Training Excellence*

- a. Promote learner and resident success through an educational platform of medical knowledge, research and clinical care, integrated with a deep understanding of population health, health disparities, interprofessional interventions and the social determinants of health.

2. *Health Care and Community Health*

- a. Design and deliver a trademark brand of clinical care focused on population health management to improve South Florida's health outcomes, reduce health

care costs, and optimize patient experience, while providing an innovative clinical learning environment for students.

3. ***Research and Evaluation***

- a. Conduct basic, applied, translational, clinical and interdisciplinary research that leverages South Florida's diverse demographics, improves the health of the South Florida community and aligns with national and global health trends.

4. ***Faculty and Staff Success***

- a. Foster a culture of excellence, innovation and professionalism by attracting and retaining faculty and staff who embrace diversity and are lifelong learners and forward thinkers.

5. ***Strategic Partnerships***

- a. Forge and strengthen partnerships that provide optimal learning environments for students, residents and faculty; establish platforms for research and create value for the community and FIU.

Additional considerations:

Although no procedure can address every scenario, this document is intended to cover the most common travel-related situations; where unusual circumstances arise, exceptions will be provided on a case-by-case basis.

1. All travel must be approved by the Supervisor or designee and the Expense Manager and there must be an approved TA prior to purchase or registration. Individual unit managers are required to keep a travel expense log with the approved travel and final total cost for each faculty and staff by academic year. Unit budget approver managers will provide the travel expense log to the department chair and/or executive associate deans or designees to ensure compliance.
2. A faculty member who has grant funding from an external (non-FIU) source is expected to use grant funds for related travel whenever possible; however, he or she must still seek approval in advance through the HWCOTM travel authorization process.
3. All travel for faculty or staff in positions (e.g., Office of Student Affairs) who have job duties that require travel will be supported with appropriate justification and alignment to HWCOTM plan and/or goals.
4. Faculty and staff members may be allocated additional funding for professional development activities based on their involvement in national or international committees and organizations on a case-by-case basis.
5. Traveler must ensure that all clinical, education and research commitments are appropriately covered during travel period prior to submission of the TAR.

6. The same scientific presentation/poster must not have been submitted for reimbursement for travel to other conferences.
7. Necessary changes to travel itinerary must have a valid justification.
8. All international travel must be recognized as a leading academic meeting or offer high-level visibility for FIU and travel approved before making any travel arrangements or meeting registration.
9. Faculty or staff will be expected to present and/or provide a report on the knowledge gained from any professional development travel at the request of the chair, executive associate dean and/or dean.
10. A TAR may be reduced or denied due to insufficient travel funds in the department or college budget.
11. Chair and/or executive associate deans have the discretion to reallocate funds in an effort to optimize the travel budget.

RESOURCES:

FIU Travel Manual

FIU Travel Policy

International Travel Policy for Employees and Students