

PennDesign Global Travel Protocols for Faculty and Staff updated January 2017

The following protocols are guidelines for faculty and staff when conducting *international* traveling studios for the purposes of establishing a uniform mechanism for procuring travel services across the School and to inform faculty trip leaders of their *pre-departure* duties and responsibilities for ensuring the safety of all of their travelers.

1. AIRLINE PURCHASES

1-A. Group Airfares

All international **group** travel should be arranged through **World Travel** for a fee of **\$20 per person** by completing the [Group Air Travel Form](#) and *emailing* it to uofpenn@worldtravelinc.com. This is the preferred initial contact method for arranging group travel. In response, an agent will be assigned to your group and contact you within two business days.

The **group designated travel arranger**, whether faculty, staff, or student, should request at least *two pricing options, direct flight and a layover, to compare pricing alternatives*. The group designated travel arranger must provide to World Travel the business purpose of the trip and their 26-digit account ending in **0067 or your assigned STUDIO CREF**.

The final approved cost will be *directly billed* against the account provided.

1-B. Individual Airfares

The preferred method for booking international **individual** airfares is through the University's on-line booking tool **Concur** for [Faculty and Staff](#) or [Students](#). The billing option through Concur will depend on the total cost of the airfare and the pre-approved amount per ticket the travel budget allows;

- i. If the cost of the airfare is *less* than the pre-approved amount per ticket, then chose the *direct bill* option. The direct bill option will charge the travel budget.
- ii. If the cost of the airfare is *more* than the pre-approved amount per ticket, then choose the option to enter a personal credit card. The paid receipt can be submitted for reimbursement using a **Concur Expense Report** (see section 1-D)

1-C. Bank of America (BOA) Corporate Credit Card

All faculty trip leaders are encouraged to have a BOA card by [clicking here](#) at least 14 days prior to departure in order to use the BOA card for group hotels, ground transportation, dinners, and other pre-approved travel studio miscellaneous travel expenses. The BOA card doesn't preclude the need to obtain itemized receipts necessary when reconciling your expenses in Concur. Part-time faculty must request an *exception* to the University's full-time cardholder rule by emailing pdtravel@lists.upenn.edu

No student should be asked to place pre-approved department reimbursable studio charges on his/her own personal credit card.

1-D. Concur Expense Reports

Students seeking reimbursements for pre-approved studio travel expenses should be forwarded a **TEM Concur Expense Report - Student Starter Kit** [Concur Expense Report - Starter Kit](#). Students will not be able to access the **Concur Expense Report** tab until their names and PennID numbers have been *uploaded* into the Travel Expense Management system (48-72 hours). Please provide student travelers to **Mandy Wood** via amanwood@design.upenn.edu

2. Accommodations

If the travel budget allows, it is strongly recommended that faculty and students stay in the same accommodations. Since most hotels require the credit cardholder to be on-site, the preferred methods to HOLD a reservation and pay for the rooms are;

1. Faculty trip leader uses their Penn issued Bank of America (BOA) credit card.
2. Design's Financial Administrative Office (FAO) uses Penn issued Meeting* credit card.

*option available only if the faculty trip leader cannot obtain a BOA credit card

3. Pre-Departure Check-List

3-A. Global Activities Registry (GAR)

For compliance purposes, all international travelers, including faculty trip leaders, must register and **confirm their participation** in the **Global Activities Registry** [Global Activities Registry](#). The intention of the Global Activities Registry is to capture international travel conducted by Penn faculty, students, and staff for the purposes of:

- activating enrollment in International SOS (ISOS) and travel medical insurance
- contacting travelers in emergencies
- assisting individuals and groups, as needed, with pre-travel preparations
- identifying opportunities for closer collaboration on international research and operations

Registration can be done at the departmental level, or by sending **Christine Williams**;

- course number(s)
- destination(s)
- departure and return dates of travel

An automated email will be generated notifying travelers to log on to the Global Activities Registry and **confirm their participation** in the trip. All travelers will then be required to enter their;

- (update) emergency contact information
- passport information
- flight numbers from each city of departure/arrival including all layovers

Travelers will automatically be enrolled in Penn's **International SOS (ISOS) program** <https://global.upenn.edu/global-resources/travel-guide/international-sos>

Some of the benefits of enrolling include;
Medical Services

- **Travel health insurance**
- Linking travelers to pre-screened & approved local medical facilities
- Emergency evacuation
- Medically-supervised repatriation
- Additional travel and accommodation assistance after medical evacuation
- Inpatient admission and medical monitoring
- Dispatch of medication and medical supplies

Travel Services

- Legal referrals
- Translations and interpreters
- Lost travel document advice

Security Services

- Security evacuation assistance
- Online travel security assistance
- Emergency and routine security advice

3-B. Visas

The traveler is responsible for obtaining the appropriate travel visa (if necessary) prior to the departure date of the trip. To check whether a visa is necessary, CIBT visas <http://cibtvisas.com/>

3-C. Waiver Form(s)

All travelers must sign the University's **Acknowledgment of Risks & Release from Liability** form. [Liability Form PennStandard.pdf](#)

These forms should be kept on file in the department until the term is completed.

3-D. Medical Risk Awareness

In lieu of collecting a travel health form, all travelers must be informed of the planned itinerary and locations (i.e., mountain hike) they are visiting and given two options* if they feel there is a medical concern;

1. Contact their primary physician
2. Contact Jaime Molyneux, Director of International Risk Management at molyneux@upenn.edu or 215-573-6122

*suggest including this in the pre-departure orientation (see 3-E #7)

3-E. Faculty Trip Leaders

The trip leader is usually the lead faculty member of their studio. With approval from the department chairman, a lead faculty member may designate another faculty member or teaching assistant in their studio as a secondary trip leader. The faculty trip leader must review and complete each task on the trip leader checklist [trip leader checklist](#).

Here are some of the responsibilities that need to be completed *prior to departure* (the full list is attached);

- Confirm your participation in GAR (see required information above)
- Review the trip leader training video** <https://youtu.be/b9-y1as3ySQ>
- Submit a **Local Contingency Plan for Emergency Incidents Abroad**[^] [local contingency plan](#)
- If **undergraduates** are enrolled in a high risk area, follow [travel request process](#)
- Maintain a *workable* mobile phone in-country for 24 hours each day while on the trip
- Collect each traveler's passport/visa*, cell phone #, and emergency contact information
- Hold a **pre-departure orientation**[%] for the students in their studio
- Distribute **ISOS cards** and **Local Contingency Plan for Emergency Incidents Abroad**

[^] Submit to your department coordinator

*Copies only – no originals

[%]Pre-departure orientation involves a risk assessment specific for your destination. Please contact Jaime Molyneux at molyneux@upenn.edu 215-573-6122 to arrange a pre-departure orientation.

Important links

Financial Administrative Office (FAO) <http://www.design.upenn.edu/fiscal-operations>

Global Services <http://global.upenn.edu/>

Internal Process List

1. Chairmen approve travel for select studios
2. Lead Faculty apply for a BOA card
3. Coordinators inform Christine Williams of all of their traveling studios
4. Department or Christine enter faculty and students into GAR
5. Airline tickets are purchased as a group or by individuals
6. Faculty and students confirm their participation in GAR
7. Lead faculty member of the studio reviews trip leader checklist
8. Lead faculty member attends trip leader training
9. Lead faculty completes **Local Contingency Plan for Emergency Incidents Abroad**
10. Faculty leader or *designated secondary trip leader* collects waiver forms
11. Coordinator distributes International SOS Cards
12. Coordinator runs a report in GAR to produce a list of traveler's emergency information

TRIP LEADER CHECKLIST

If you need assistance or have any questions about the checklist, please contact Jaime Molyneux, Director of International Risk Management at molyneux@upenn.edu or 215-573-6122.

Pre-departure

- All travelers should register in Penn's [Global Activities Registry \(GAR\)](#). Group travel registration can be initiated by a group administrator or trip leader.
- Travelers should be encouraged to also register their travel in the U.S. Department of State's [Smart Traveler Enrollment Program \(STEP\)](#).
- Trip leaders should be knowledgeable of travel risks specific to their destination and develop an itinerary that bests mitigate such risks (see resources below).
- Trip leaders should be knowledgeable of the resources available in case of emergency including International SOS, local U.S. Embassies/Consulates, local authorities, Penn Police.
- Trip leaders are responsible to develop an **emergency plan** and be available 24/7 to travelers in case of an emergency during the trip. If you do not already have an emergency plan, consider using the "Local Contingency Plan for Emergency Incidents" on page 4 of this document.
- All trip leaders should carry a working cell phone in-country and distribute the phone number to travelers.
- Trip Leader should conduct a pre-departure orientation to discuss cultural norms, travel risks, safety precautions, physical and mental health issues, expectations of conduct, and explain the emergency plan.
- All travelers should be given an [International SOS](#) wallet card and understand how and when to use it.
- Trip leader should distribute important phone numbers (preferably on a wallet card) including the 24-hour on-site contact, International SOS, local police, Penn Police. Encourage travelers to save important phone numbers in their mobile phone and/or email.
- The appropriate main campus contact should be established to hold copies of the daily itinerary, copies of passports/visas, on-site contact information, medical information and emergency contact information. This information should be held in a confidential manner. This person should be identified as "group administrator" in GAR.
- Trip leader should identify a back-up faculty or staff member that can serve as trip leader in the event he/she is unable to fulfill their role for any reason. This person should be available and "on call" during the trip.

To be collected:

*Items marked with an asterisk should be carried and accessible throughout the trip.

- "Acknowledgement of Risk and Release from Liability" form reviewed and signed by each student traveler
- *Emergency contact information including name, relationship, phone number and email.
- * Medical Risk Awareness (see section 3-D)
- *Flight itineraries for each traveler
- *Local Contingency Plan for Emergency Incidents (see page 4 of this document)
- Copies of passports/visas (to be collected/saved in confidential manner)

Additional Steps for Heightened Risk & Travel Warning countries

- Trip leader reviews the list of [Heightened Risk Regions](#) and associated travel advisories.
- Undergraduates Only:** Complete the [Travel Request Process](#) for Heightened Risk Regions.
- Trip leader contacts International SOS to request a destination specific “Travel Security Brief” and/or arranges a conference call with a regional security analyst for all travelers to attend. International SOS will address specific questions about the destination (from both a security and medical perspective) and how to use/contact ISOS while traveling.
- Trip leader works with Director of Risk Management to prepare an emergency response plan for the trip which would include a 24-hour emergency contact number on-site, local hospitals vetted by ISOS, Embassy information, evacuation plan, medical and emergency contact information for the students, etc.
- Travelers are given a copy of the Travel Warning (if applicable) and ISOS Security Brief
- Travelers review/sign an **Acknowledgment of Risks & Release from Liability** form (hold harmless agreement) specific to heightened risk/Travel Warning countries.
- Chair/Dean of the academic department should be informed (and in support) of the program

ADDITIONAL RESOURCES FOR PENN TRAVELERS

Emergency Response

In the event of an emergency abroad involving a Penn student or employee, please contact local authorities, International SOS (215-942-8478) and/or Penn Police (215-573-3333).

Global Activities Registry (GAR)

- Registration is mandatory for all students and faculty traveling with students
- Individual and group (w/course #) registration
- Automatic feed to International SOS
- [Click here](#) to log-in using your PennKey

International SOS (Medical & Security Assistance Provider)

- [Click here](#) to visit Penn dedicated website, which provides benefit information, country security reports, medical reports and online member ID cards
- All Penn students, faculty and staff are members
- Includes evacuation/repatriation coverage
- Penn Member ID: 11BSGC000012
- Philadelphia Alarm Center: 215-942-8478 or 1-800-523-6586

International Travel Guidance

Please visit the [International Travel Guidance](#) webpage for more information on travel safety, tips and resources, and the list of [Heightened Risk Regions](#).

Pre-departure Meeting

During the pre-departure briefing, emphasis should be placed on security precautions and emergency plans, including the phone numbers of local emergency services, International SOS and the on-site staff

member's 24-hour cell phone number. [Jaime Molyneux](#), Director of International Risk Management, is available to provide country specific information and/or present to your group travel safety and emergency procedures.

Travel Medicine

Student Health Service offers travel consultations and immunizations to students traveling abroad and their significant others. To ensure that you have sufficient time to complete a course of immunizations, make sure to schedule your appointment at least 4-6 weeks before leaving for your trip. Students can make a travel appointment at [Student Health Service](#). Faculty and staff can make an appointment at [Penn Travel Medicine](#).

Global Support Services

Global Support Services supports the administrative and business functions of global activities at Penn, including travel logistics, visas, technology, research, export control, contracts, legal and financial issues. For more information, visit the [Global Support Services](#) website or contact 215-898-1640.

Questions?

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