	Office of Student Affairs Division of Academic Affairs Brody School of Medicine East Carolina University	SOP #	5.1.1
		Version #	1
		Implementation Date	January 2023
Heading:	Student Travel Procedure	Last Reviewed/Update Date	June 20, 2023
		Approval by ECC	July 5, 2023

SOP Title: BSOM Medical Student (Learner) Travel Procedure

Rationale

Travel and Reimbursement policies and procedures at East Carolina University (ECU, or University) require compliance with State policy, State law, and Federal law. The East Carolina University Policy Manual is the official repository of all approved policies, regulations, and rules (PRRs) at ECU. All travelers should familiarize themselves with these PRRs prior to traveling. The Brody School of Medicine (BSOM) and the Office of Student Affairs (OSA) adhere to the guidelines set forth by East Carolina University regarding travel. Learners should familiarize themselves with ECU's Travel Procedures Manual prior to applying for travel funding.

Scope

The Standard Operating Procedure (SOP) applies to all learners at the BSOM. It outlines the procedures for applying for travel funds through the Office of Student Affairs. The SOP also establishes expectations to key stakeholders for required timeframes for submitting documentation, and the consequences for failing to comply with these expectations. This SOP affects learners, staff, faculty members, and course/clerkship directors of the BSOM.

Definitions

Chrome River: Chrome River is an accounting software application designed to automate and streamline Accounts Payable processes for travel expenses, employee reimbursements and corporate credit card transactions. This software product is designed to incorporate University travel rules and approval processes. Chrome River will replace the Online Travel system and the ProCard reconciliation process in WORKS.

Clinical Phase: The third and fourth academic year of the BSOM curriculum.
Foundational Phase: The first and second academic year of the BSOM curriculum.

Requirements for Applying for Student Affairs-Funded Travel

- Learners must be in good academic standing to participate in university-funded travel.
- To receive funding for travel, learners must be <u>presenting</u> at an academic medicine conference.
- A Student Travel Request application along with supporting documentation (listed below) must be submitted at least thirty (30) calendar days prior to the conference date. An excused absence form must also be submitted at this time. Travel requests submitted less than thirty (30) days before the start of the conference will not be considered.
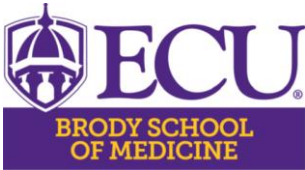
- o Travelers should review the Student Attendance Procedure found on OSA website for more information regarding conference travel and excused absences.
        - o Travelers should be mindful of deadlines for submitting excused absence requests prior to travel funding.
- Travel applications must be submitted via REDCap. This form can be found on the OSA website and **here**.
- The completed REDCap form must include all of the following:
    - o The completed REDCap document on the OSA website.
    - o Attached to the form: A copy of the accepted abstract/notification letter
    - o Attached to the form: A copy of the invitation with the learner's name to present or confirmation letter from the meeting; or a copy of letter confirming manuscript acceptance.
    - o A letter of support from the learner's research preceptor describing the learner's role in the project and what additional funding support is available for the learner to travel.
    - o Incomplete applications will not be accepted.
- Each learner may apply to Student Affairs for one (1) applicable travel trip over the course of their time at ECU BSOM. Learner trips are funded up to $1,500, including registration, hotel and lodging, airfare, printing and graphics, transportation, etc. Learners are encouraged to seek alternative sources of funding to cover the cost differential or other trips.
- ECU BSOM will approve learner travel based on funding availability and overall quality of the application. ECU BSOM reserves the right to deny learner travel if funding is not available.
- If approved, the learner will need to meet with the appropriate staff in OSA to finalize travel arrangements.

Requirements for Receiving Reimbursements for Travel

- Documentation
    - o Specific documentation requirements for reimbursements are identified in the Travel Procedure Manual. Travelers must review specific requirements prior to the travel start date.
    - o Receipts for the following items must be provided for reimbursement:
        - ▪ Transportation
            - Taxi, Uber, Lyft, etc. A digital copy of the receipt will be accepted.
            - Learners will be reimbursed at the state rate per mile if driving their personal vehicle to and from the destination. The Travel Procedure Manual outlines guidelines for transportation reimbursement.
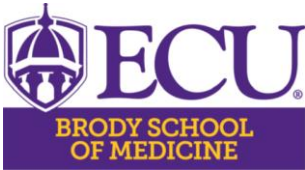
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- Learners should contact OSA before booking any rental vehicles to ensure compliance with the University Travel Procedure.
  - Parking
  - Flights (departing and returning)
  - Conference Registration
    - The ECU ProCard is the preferred method for paying for registration fees. Learners can book conference registration through OSA staff.
  - Hotel/Lodging
    - Learners using any third-party lodging options, such as timeshares, campgrounds, Airbnb, etc. must have pre-approval before booking these locations.
  - Meals
    - Meals will be reimbursed at the per diem rate.
    - Meals that are part of a registration must be excluded from the subsistence expense on the travel reimbursement, even if the traveler did not participate.
- The documentation provided with the reimbursement request must clearly substantiate the appropriateness and accuracy of the item, the method of payment, the amount, and that the individual paid for the item (if a travel or non-travel reimbursement). Evidence includes original itemized receipts (electronic version is acceptable), hotel bill (if applicable) with a $0 balance, conference agendas (if applicable), and other documentation appropriate to the situation. If the method of payment is not indicated on the receipt, alternative proof of payment must be provided – such as a bank statement or a credit card statement. Sensitive information (including personal home address, cell phone number, bank account number, routing number, credit card number – except the last four digits, etc.) must be redacted.
- The documentation must also accurately indicate the times of travel and items submitted for reimbursement must conform to that period.

Responsibilities

There are several key stakeholders involved in the travel process. Listed below are each key stakeholder, along with their expected responsibilities and time frame for completion.

Associate Dean of Medical Education
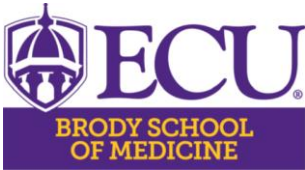
- Communicates with OSA, the Review and Promotion Committee, and/or the Professionalism and Community Standards Committee on any non-compliance issues.
- Communicates any scheduling issues to the Testing Administrator.

Testing Administrator
- If travel interferes with an assessment:
  o Works with learners to confirm a make-up assessment that follows the established timeframes in this SOP.
  o Ensures a make-up assessment is ordered (for NBME Exams) and notifies all vested parties regarding the scheduled make-up date.
  o Ensures proctor availability for any scheduled make-up assessment.
  o Ensures assessment logistics are provided and room reservations are scheduled.
  o For internally created assessments, notifies Course Directors and the Deans of the Office of Medical Education (OME) upon the completion of the make-up assessment for timely grading.

Office of Student Affairs
- Approver of learner travel requests.
- Designated staff will assist with learner travel reservations/reimbursements.
- Communicates with learner regarding travel pre-approval, procedures before, during, and after travel.
- Provides absence approval for travel event.

Medical Students (Learners)
- Learners requesting university-funded travel must complete the 'Travel Request Form'.
- Learners must submit all supporting documentation with their travel request form.
- Learners must submit an absence request form on the OSA website for the affected travel days.
  o Learners must submit an absence request for professional travel at least 14 calendar days prior to the first day of travel for M1 and M2 students and 14 calendar days prior to the start of the affected clerkship for M3 and M4 students.
  o Learners must ensure these travel days do not conflict with any mandatory class activities. Conference travel will not be approved if it conflicts with an orientation day, OSCE exam, oral exam, or any mandatory learning event.
  o Learners are responsible for communicating with course directors or clerkship directors about days missed due to professional travel and any makeup work associated with these dates.
  o Learners must provide all necessary documentation for travel pre-approval and/or reimbursement where applicable.
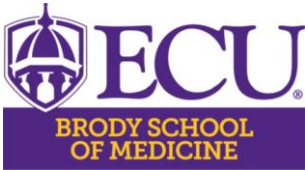
- Learners must familiarize themselves with the Travel Procedure Manual prior to travel requests.

Schedule for Review

This procedure is reviewed and approved by the Curriculum Committees, including the Executive Curriculum Committee, Foundational Curriculum Committee, and Clinical Curriculum Committee every three years.

Related Policies

Attendance Policy
Travel Procedure Manual

Applicable Laws, Regulations & Standards

LCME Standard 5, Element 1; Standard 6, Element 3; and Standard 6, Element 6.