

## Carnegie Mellon University – International Finance

### High-level Travel Guidelines – Pittsburgh originations and departures

Hello, and welcome to Carnegie Mellon University International Finance! We are here to assist you with your Qatar travel needs and want you to enjoy your travel experience. Whether traveling abroad or domestically, we in International Finance are here to assist you in coordinating your Qatar business travel arrangements in order to make the reservations process as simple and convenient as possible for you.

Our objective is to provide you with necessary support and services relative to booking your travel arrangements related to Qatar business activities. As such, we will be your primary conduit for coordinating travel accommodations that are charged to Carnegie Mellon University's international campus accounts.

Typically, the process of booking travel accommodations involves a variety of departments in order to obtain flights, lodging, transportation, Visa documents, and insurance coverage (when applicable). While each of these items may involve a variety of individuals, you as the traveler will normally only need to work with the International Finance Travel Analyst who will be your advocate for processing your travel arrangements. This individual can be reached at the following email account in order to start the process:

[qartravl@andrew.cmu.edu](mailto:qartravl@andrew.cmu.edu)

In order to begin coordinating your travel arrangements there are a few forms and documents (attached) that you will need to review and complete. Explanations related to each of the documents you need to become familiar with are provided below for your reference when completing or reviewing each specific form:

#### Forms to be completed

<p style="text-align: center;"><b><u>Request for Transportation Ticket (TR):</u></b> <i>return to International Finance</i></p> <p>The TR form is primarily used to obtain data related to the purpose of travel, account coding to be used when booking the travel expense, certification from the traveler that the travel relates to CMU business and approval of the travel cost by the appropriate Department Budget Manager.</p> <p>The traveler is to complete this form at the time they have obtained a travel itinerary that meets their travel needs. Additionally, this form must be signed and approved by the traveler and the Manager responsible for the University account number being charged for the travel cost.</p>	<p style="text-align: center;"><b><u>International Travel Registration Form (ITRF):</u></b> <i>return to International Finance</i></p> <p>The ITRF form is used to obtain traveler contact information and the traveler's relationship with the University in order to assist in booking appropriate accommodations and insurance coverage (when applicable).</p> <p>Once completed, the form should be sent to the International Finance Travel Analyst who will work with the Human Resources Benefits Specialist located in Pittsburgh and/or Qatar.</p>
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#### Documents you will receive for travel planning

<p style="text-align: center;"><b><u>International Travel Health Insurance Benefits:</u></b> <i>retain for your reference purposes</i></p> <p>This is a one-page overview of the CMU health insurance benefit options that are available to <b>employees</b> who are traveling on official University business. This document also provides contact information for the CMU HR Benefits Specialist and the insurance carrier if questions arise.</p> <p><i>Travelers who are not employees of CMU should disregard this document as they will need to coordinate their own insurance coverage while traveling for the University.</i></p>	<p style="text-align: center;"><b><u>Aetna Global Benefits overview:</u></b> <i>retain for your reference purposes</i></p> <p>The Aetna insurance company has provided a straightforward, two-page document which outlines the services provided to <b>employees</b> of Carnegie Mellon University who are traveling abroad. This document contains a standard card for all CMU employed travelers, which a traveler can simply carry with them during their trip by cutting out the pre-printed benefits card. This will provide all the necessary contact information in the event of a medical need.</p> <p><i>Travelers who are not employees of CMU should disregard this document as they will need to provide their own insurance coverage while traveling for the University.</i></p>
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<b>Documents you will receive for travel planning - continued</b>	
<p style="text-align: center;"><b><u>Travel Itinerary / electronic ticket:</u></b> <i>retain for your reference purposes</i></p> <p>At the time we have completed booking your airline accommodations you will receive a document from International Finance that is provided by our travel agency that details your confirmed airline travel plans.</p> <p><b>It is critical that you retain this document as it will serve as your electronic ticket that will be needed at the airport for security processing and boarding.</b></p>	<p style="text-align: center;"><b><u>Work Visa:</u></b> <i>retain for your reference purposes</i></p> <p>The International Finance Travel Analyst will work with the appropriate University individuals to obtain your work Visa when needed. Once obtained, the approved Visa will be sent to you by the Travel Analyst to file with your travel records. This document will be needed when traveling abroad and is your means of passing through the customs processing area of each final destination airport.</p>
<p style="text-align: center;"><b><u>Lodging and Transportation confirmations (when applicable):</u></b> <i>retain for your reference purposes</i></p> <p>If you require lodging and transportation accommodations you will need to work through the International Finance Travel Analyst who will coordinate these arrangements.</p> <p>At the time the Travel Analyst has completed the reservation(s) they will send you an e-mail confirmation that should be retained with your travel records for use when you arrive at the hotel or transportation service provider.</p>	<p style="text-align: center;"><b><u>Side-trip calculation and agreement:</u></b> <i>retain a copy for your records and return the signed original to International Finance</i></p> <p>If you plan to take a side-trip for personal purposes during your travel itinerary you will need to agree to fund this portion of the travel cost either through personal funds or via alternate University sponsorship. In either case, the International Finance Travel Analyst will calculate the cost of the side-trip and will provide you with the cost of the side trip.</p> <p>Once you agree to pay or have secured University funding for this additional travel cost you will need to send this authorization along with your payment to the International Finance Travel Analyst.</p> <p><i>Please note that any itinerary that includes a requested side-trip will not be booked until the University has confirmation of financial responsibility for the requested side-trip cost.</i></p>
<p style="text-align: center;"><b><u>Insurance coverage confirmation (when applicable):</u></b> <i>retain for your reference purposes</i></p> <p>If you are an employee of CMU you may be eligible to receive additional insurance coverage through the University. If this is the case, the International Finance Travel Analyst will work with the appropriate Human Resources staff members and will send you a confirmation of coverage prior to your travel departure date.</p>	<p style="text-align: center;"><b><u>Traveler summary report:</u></b> <i>retain this report for your records</i></p> <p>Once all travel arrangements and accommodations have been confirmed, the International Finance Travel Analyst will prepare a report which summarizes all areas of the travel itinerary to include sponsor information, emergency contacts, travel purpose, legs of travel, etc.</p> <p>This report should be used as a quick reference tool if you need basic information regarding your travel arrangements.</p>

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In general, traveling for the University is no different than traveling for personal reasons; however, there are policies and rules that the University is obligated to uphold when making your travel arrangements. While the majority of these policies can be accessed via the University’s website at:

[http://www.cmu.edu/finance/controller/bte/files/bte\\_policy.pdf](http://www.cmu.edu/finance/controller/bte/files/bte_policy.pdf)

... there are select topics that tend to require additional clarification and direction from International Finance.

The following table of supplemental information is provided to assist you in gaining general knowledge about a small portion of the overall policies of Carnegie Mellon University relative to booking business related travel accommodations. While this table of information has a basis from the University’s travel policies, the actual University policy will be the superseding document if additional questions arise or clarification is needed.

Traveler Notes	
<p><b>Airfare:</b></p> <ul style="list-style-type: none"> <li>* Travelers must request all itineraries via International Finance,</li> <li>* All itineraries will be booked using the “most direct and economical flight” options available,</li> <li>* The “Normal” route from Pittsburgh to Doha routes through Washington’s Dulles airport via Qatar Airways,</li> <li>* “Most direct” flights will be determined based upon the individual traveler’s home city,</li> <li>* All international flights to Qatar will use either Qatar Airways or British Airways; their partner carriers will be used for domestic flight legs,</li> <li>* Ticket upgrades will be paid by the traveler,</li> <li>* Excess baggage fees will normally be covered for reimbursement if excess baggage allowance is not exceeded,</li> <li>* Frequent flyer miles accrue to the traveler,</li> <li>* Travelers may accept itinerary “bumps” as long as it does not impact University business or generate additional travel expenses,</li> <li>* Costs associated with in-flight meals are generally reimbursable; see “Meals”.</li> </ul>	<p><b>Hotels / Lodging</b></p> <ul style="list-style-type: none"> <li>* Travelers must request hotel accommodations via International Finance,</li> <li>* Traveler’s accommodations will be booked using the University’s preferred / contracted facilities,</li> <li>* Conference lodging can be used as an alternative to preferred suppliers as long as charges are reasonable,</li> <li>* Extended travel to a single destination will be evaluated for use of available University housing,</li> <li>* Family lodging expenses are generally the responsibility of the traveler,</li> <li>* Reasonable phone, internet, and other technical service charges will be reimbursed,</li> <li>* Movies, mini-bar, and other non-essential personal incidental charges will be the traveler’s responsibility,</li> <li>* Hotel rewards points accrue to the traveler.</li> </ul>
<p><b>Ground Transportation:</b></p> <ul style="list-style-type: none"> <li>* The reimbursable mileage rate used is based upon the IRS rate in effect during the travel itinerary dates,</li> <li>* Travelers should use the University’s preferred suppliers for rental vehicles,</li> <li>* Mileage to and from the airport is reimbursable,</li> <li>* Travelers abroad may use public transportation, shuttles, etc. when available and reasonable,</li> <li>* Alternate forms of travel are reimbursable in lieu of airfare (rail, rental vehicles, bus, etc.),</li> <li>* Parking, tolls, ferries, etc. are reimbursable business expenses in addition to mileage,</li> <li>* Fuel costs are considered to be reimbursed within the mileage rate,</li> <li>* Traffic citations will not be reimbursed.</li> </ul>	<p><b>Meals</b></p> <ul style="list-style-type: none"> <li>* Travelers must choose a “Per Diem” or “Actual Expense” rate of reimbursement,</li> <li>* The reimbursement method chosen will be used during the entire travel itinerary,</li> <li>* If “Per Diem” is selected:                         <ul style="list-style-type: none"> <li>- Meals provided to travelers by others must be deducted from the daily per diem rate,</li> <li>- Business meals purchased by the traveler for others can be submitted for potential reimbursement,</li> <li>- Travelers must use the appropriate “Per Diem” rate tables based upon their travel location,</li> </ul> </li> <li>* If “Actual Expense” is selected:                         <ul style="list-style-type: none"> <li>- Travelers must submit actual meal receipts,</li> <li>- Travelers must use sound judgment,</li> </ul> </li> <li>* Alcohol expenses will not be reimbursed,</li> <li>* Family member’s meals will not be reimbursed.</li> </ul>

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## Traveler Notes – continued

### Side-trips:

- \* A side-trip is defined as an itinerary requested by the traveler that does not utilize the “most direct and most economical” travel fare route.
- \* The amount approved by an additional sponsor or owed by the traveler is determined by comparing the cost of the “Normal” route with the cost of the requested route.
- \* Identical ticket fare (refundable/non-refundable) and seating classes (business/economy) will be used for each itinerary (normal route and requested route) for cost comparison purposes.
- \* Travelers are expected to pay for the calculated side-trip cost prior to travel departure.

### HR topics / Insurance Coverage:

- \* The University’s HR department will assist travelers with their benefit, insurance, and other HR related inquiries,
- \* Specific medical tests and clearance are required prior to traveling abroad,
- \* The University generally provides insurance coverage to employees who travel for business purposes,
- \* The CMU benefits workbooks are a good reference to explain benefit options.

### Relocation:

- \* Possible tax implications related to international travel assignments should be addressed with the traveler’s personal financial / tax advisor and /or the University’s designated tax advisory service,
- \* Excess baggage fees may be reimbursable but should be discussed with the traveler’s manager

### Other:

- \* Visa paperwork processing will be coordinated by International Finance,
- \* The cost and coordination of transporting pet(s) will be the responsibility of the individual traveler,
- \* The traveler will be responsible for the cost of non-University sponsored/coordinated excursions,
- \* Travelers should contact the University’s Security group if they have concerns regarding travel risk,
- \* Tartan cards and University P-cards cannot be used to pay for travel expenses, and
- \* Lost, stolen, or misplaced personal and University items will be the responsibility of the traveler

On a final note, your satisfaction and safety are the University’s primary concern when coordinating your business travel accommodations.

Therefore, if you have any questions or comments as a result of this process, please do not hesitate to contact the Manager, International Finance at (412) 268-5317 or [cmurray@cmu.edu](mailto:cmurray@cmu.edu) for additional assistance.

Thank you, and have a safe, productive and enjoyable travel experience!



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