

Purpose: The following are travel & business policies for the General Surgery Graduate Medical Education residents, as either University of Pittsburgh trainees or UPMC employees. **The guidelines apply to ALL General Surgery residents of the Department of Surgery.** Deb Williams and Kathy DiGiacomo will process travel requests for General Surgery research residents. Clinical residents are to contact the residency coordinator, Maggie Mrozinski, or Division administrators for travel assistance.

Effective 3/1/2017: New University PantherExpress Travel and Expense Management Program. All products and services are now booked with Concur and Anthony Travel. The new program involves a major change from the previous university travel policy - **all travel arrangements will need to be made with your approved delegate, Kathy DiGiacomo or Maggie Mrozinski, as you can no longer make your own travel arrangements.**

- PRIOR APPROVAL
Prior approval of all travel must be obtained from the requester's Principal Investigator (PI) **AND** Dr. Allan Tsung before making any travel arrangements.
No one is permitted to approve his or her own travel; the next higher level of authority must be sought for approval. Acceptable forms of travel approval are: PI approval in an email that details the travel request or other written approval that contains the PIs signature. Please forward travel approval to Dr. Tsung.
- CONCUR PROFILE for NIH T32 appointed Trainees ONLY
In order to use the new online system a user profile will need to be completed. This can be done by visiting the Concur homepage through my.pitt.edu and following the instructions. Please refer to our General Travel procedures (attachment 1).
- TRAVEL ARRANGEMENTS
All travel related bookings are now through the new online booking management tool, Concur. After you have received your PI travel approval please make an appointment to meet with your delegate to make your bookings. This can be done after completing and submitting the online travel form that can be found on the website <http://www.gensurgerylabs.pitt.edu/travel-request-form>
- REIMBURSEMENT
The reimbursement process will be initiated after the conference has been held. Please submit any receipts, paperwork, credit card statements, etc. to Kathy DiGiacomo or Maggie Mrozinski within **30 days** of the conference. If you are a Pitt employee or trainee, your reimbursement will be sent to you via direct deposit. Direct deposits occur every Friday. If you are a UPMC employee, you will receive a check from the University via the US mail.

Department Supported Resident Travel

The Department of Surgery will support resident travel for:

- presentations at a local or national conference OR
- accepting or giving a progress report of their award within the 48 contiguous states, then the department will reimburse the travel expenses. The University of Pittsburgh's travel management guidelines <http://www.pts.pitt.edu/Travel/index.html> will serve as a basis for our travel policies.

The Department will support **2** conferences (oral or poster presentation) per year for residents in their research years. For clinical residents, there will be support for **1** meeting per year where the resident has an oral presentation. Additional travel support will be the responsibility of the PI or clinical division. Exceptions to the above number of Department supported travel can be requested by contacting Dr. Tsung (e.g. Plenary presentation at National meeting).

Allowable expenses:

To streamline the process once you have been notified of an oral or poster presentation please make an appointment with your travel delegate, either Kathy DiGiacomo or Maggie Mrozinski, to process the following:

1. Airfare to the conference city- All airline reservations are to be made through Concur and **within 4 weeks of acceptance** of either an oral or poster presentation. All flights for domestic business must be coach class. In event of cancellation, please notify the travel agency as soon as possible. **Fees resulting from lost or unused airline tickets are the responsibility of the traveler.**
2. Conference registration- **early registration is required** to take advantage of the cost savings. Please meet the deadline for early registration reduced fees. If the traveler is not able to do so then a justification is required. Please submit to Dr. Tsung.
3. Tuition registration fees for conference educational classes.
4. Lodging, up to **3 nights** for research residents and **2 nights** for clinical residents – if more, than a justification is required; i.e.; length of meeting; educational class attendance in conjunction with conference, etc.
 - Room sharing is **required** with same gender co-worker when possible. If a spouse or significant other shares your room then you will be reimbursed for 50% of the hotel fees.
5. Meals - are not to exceed the IRS city per diem, which can be found at <http://www.pts.pitt.edu/Travel/common/perdiem.html>. Submit all DETAILED RECEIPTS for meal reimbursement. This is required in the Concur system. (See attachment 2 for policy details).
6. Taxi's/ shuttles within reason
7. If personal car used, mileage, tolls, etc. will be reimbursed per University guidelines.

Expenses NOT Allowed: some examples are:

1. Spouses/ significant others/ children
2. Entertainment/ movie rentals
3. Alcohol
4. Rental cars- unless previously approved by Dr. Tsung
5. And other related items

PI or Lab Supported Resident Travel

If Department of Surgery residents are NOT presenting (oral or poster) and are only attending the conference at the request of their PI or at their own request, then the PI will be financially responsible for all travel expenses. The resident may be asked by his PI to use their resident enrichment funds to defray some expenses. Please see Maggie for enrichment fund information. The same procedure for travel approval and reimbursable expenses will be followed as outlined above.

Foreign Travel

ALL foreign travel requires approval of your PI and Dr. Tsung before submitting any abstracts. The PI will be responsible for all financial support of foreign travel unless Dr. Tsung grants an exception to this policy.

Department of Surgery Resident Travel Contact Information

Debra Williams
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Kathy DiGiacomo – travel delegate
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Maggie Mrozinski – travel delegate
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T32 Residents Travel

TO SETUP YOUR PROFILE IN CONCUR:

Name:* Your first and last name will be populated from your University record. **However, please make sure that it matches your photo ID that you will present to airport security.**

Address: Optional

Contact Information:* Enter your home and work phone numbers.

Adding a mobile device:* Mark as primary mobile phone.

Verify your email address.*

Emergency Contact: Optional

Travel Preferences: Optional – you would enter any frequent flyer information here.

TSA Secure Flight: Optional – TSA pre check info would be entered here.

International Travel: Only if you travel internationally frequently on University business.

Credit Cards: Optional

Request Settings: Only need to do request settings, expense settings will populate from that information. You then will be asked to “Request Delegates”. You will need to **ADD. Kathy DiGiacomo** will be your delegate. As you type in her information you should see her in the drop down list. Please check that you want her to perform travel preparation, bookings, submit requests viewing of receipts and receiving emails. Skip request preferences and your default approver’s name will be populated.

Please enable E-Receipt Activation.

Please enable Concur Mobile Registration. This will allow you to submit receipts for you trip while traveling by taking pictures of the receipt and uploading them to your trip in Concur.

***required information**

Resident Travel – Meals (attachment 2)

Meal Reimbursement when in travel status

Following are requirements for reimbursable meals while traveling:

- You will be reimbursed for meals when they ***are not provided by your conference or event.*** If the conference provides meals as part of the conference fees, they will be deducted from your reimbursement, whether you participated or not.
- You will be reimbursed for meals when incurred during travel with an overnight stay, or during travel lasting 8 or more hours without an overnight stay. ?? Include for residents?
- Departments may establish per Diem rates lower than the Federal GSA Policy Per Diem Guide.
- Reasonable reductions equal to the approximate meal value should be made to the traveler's per diem rate when:
 - a.) Meals are provided by a host or included in a conference or seminar fee.
 - b.) Any meals prior to or returning from the first and last day of travel. You will be reimbursed at a rate of 75% of you meal expenses for these travel days.