PART I – PURPOSE AND SCOPE

1.1 The Travel Procedure ("the Procedure") is an integral part of the Procurement Policy. It must be adhered to and applied by all University academic staff, administrative and support staff and students (hereinafter collectively referred to as “the Traveler”) travelling in support of the University’s mission.

1.2 The Traveler shall follow the Procedure for all University travel and other related business expenses. Where applicable, Granting Agency guidelines supersede the Procedure.

1.3 The Procedure provides the framework to facilitate travel-related decisions in alignment with the University’s sustainability objectives.

Refer to the Travel Guidelines for further implementation measures.

PART II – PROCEDURAL CONTENT

2.1 General

2.1.1 The University strives to provide the Traveler with safe and reliable travel services while supporting the University’s cost containment objectives.

2.1.2 The Traveler is responsible for assuming all personal travel expenses as well as those of any family member or other person who accompanies the Traveler.

2.2 Travel Authorization

2.2.1 The Traveler must obtain authorization from the Fund Financial Manager (FFM), whose funds will be charged for the respective travel expenses, prior to making any travel arrangements. Where the Traveler has a personal relationship with the FFM (i.e. spouse, sibling, children), such authorization must be directed to the immediate hierarchical superior of the FFM.

2.2.2 The authorization request must summarily outline possible alternatives, if any, (such as virtual conferencing) that could be considered in lieu of this trip; and justify why such alternatives are
not appropriate. The FFM is to consider if more efficient and/or economical means are available to the Traveler. This is required even when the Traveler is the FFM.

2.3 Booking and Payment for Travel Arrangements

2.3.1 The Traveler must use the University’s contracted Travel Management Company (“the TMC”) or the online booking tool (“OBT”) of the TMC to make reservations for air transportation. Other trip elements may also be booked through the TMC and OBT.

2.3.2 Payment for air and train fares booked through the TMC must be requested via the FOAPAL Authorization form, prompting the transaction to be paid by the University’s travel payment card. The bank incentives earned on this card are 100% directed towards McGill’s initiative to be carbon neutral by 2040.

2.3.3 Exception: Subject to the discretion of the FFM, professors, associate professors, librarians, and other personnel whose primary assignment at the University is teaching or research, travelling for the purpose of teaching or research, may be exempt from the requirements of 2.3.1 and 2.3.2. This exemption extends to visitors travelling for the same purposes of teaching or research, except for job candidates.

2.3.4 Wherever available and feasible, the Traveler shall use the travel related services offered by the Centre d’acquisition gouvernemental (CAG). Refer to the Travel Guidelines for details.

2.4 Transportation

2.4.1 Air

a) The Traveler shall choose the lowest logical airfare for the itinerary considering all elements of the routing are consistent with the requirements of the University activity. The lowest logical airfare is defined as the most economical class of air travel over the most efficient route taking into consideration specific travel requirements.

b) Seats in a fare class greater than economy class are only permitted for flights outside of North America and require the prior approval of the Traveler’s Dean or Vice-President/Provost.

c) Airfare that includes costs which are not a necessary consequence of travel on behalf of the University is considered personal. The Traveler is responsible for obtaining and attaching to the expense report claim an airfare quotation for the itinerary purely related to University activities (i.e. itinerary that excludes avoidable stopovers, trip extensions or other deviations). The Traveler will be reimbursed the lowest airfare. Refer to the University’s Reimbursement of Travel and other Expenses Policy.

2.4.2 Train

a) The University encourages train travel whenever practical. Train is the preferred mode of transport between Montreal to Ottawa, Toronto and Quebec City, and for other destinations within Quebec and Ontario.

b) The Traveler is authorized to use any class of train fare for any route, provided the cost of the train does not exceed the lowest logical airfare to the same destination.
2.4.3 Rental Vehicles

a) The University’s rental standard is the hybrid or electric compact to mid-size vehicle. Selection of the vehicle and duration of the rental must correspond to the requirements of the University-sponsored activity. It is the responsibility of the Traveler to ensure that appropriate driver licenses and adequate insurances are in effect for the duration of the rental period.

2.4.4 Use of Mass Transit, Taxis, Ride-Booking Services and Personal Vehicles

a) The Traveler may use Mass Transit such as buses and other public transportation. Reasonable use of taxis, ride-booking services, and car-sharing services, to and from airports, train stations, accommodations and meeting places are also allowed.

b) The use of personal vehicles for University-sponsored activities is permitted provided there is no suitable and/or economical public transportation available, or if the personal vehicle is the most sustainable option. It is the responsibility of the Traveler to ensure there is adequate insurance in effect. Refer to Travel Guidelines.

2.5 Accommodations

The Traveler shall obtain accommodations in appropriate quality lodging.

2.6 Travel Plan Changes or Cancellations

2.6.1 Travel changes and/or cancellations are costly and will only be reimbursed for valid and unforeseen circumstances.

2.6.2 To avoid unnecessary change fees and cancellation penalties, the travel booking must only be confirmed once the Traveler is certain of the trip itinerary.

2.6.3 Changes and/or cancellations must be communicated to the TMC or the applicable service provider as soon as known by the Traveler.

2.7 Voice and Data Communication

2.7.1 Calling cards and business cellular phones with pre-arranged data packages shall be used to avoid incurring excessive voice and data communication surcharges.

2.7.2 Free WIFI, where available and suitable for University activities, shall be used for accessing the internet.

2.8 Mitigating Travel Risks

2.8.1 All travel plans involving any category of students must be made in accordance with the University’s International Mobility Guidelines for “University Related International Travel Activity by Students and University Staff Accompanying them”.

Travel Procedure
2.8.2 The Traveler must follow the University’s directives and appropriate approvals, insurance, travel security and other related requirements.

2.8.3 The Traveler is responsible to undertake the necessary actions and provisions in advance of commencing travel to ensure highest level of safety and security during the trip and to mitigate any potential risks associated with the trip. These provisions include, but are not limited to:

- Obtaining adequate insurance coverage. The Traveler is responsible to have sufficient insurance, valid for the duration of the trip. Insurances may include, but not limited to, emergency travel medical insurance, emergency evacuation coverage and rental vehicle related insurance
- Registering with McGill by completing the “University Travel Registration Form for Faculty and Staff” on the Human Resources website
- Registering with Global Affairs Canada (if travelling outside of Canada)
- Providing the Traveler’s direct hierarchical superior with a detailed travel itinerary and subsequent updates
- Verifying the risk level to the destination on Global Affairs Canada travel advisory website as relates to security and health
- Ensuring that all travel documents including visa and immunizations are up-to-date and valid for the itinerary in question

2.9 Loyalty Program Points

2.9.1 The Traveler may retain for personal use any loyalty program points (i.e. frequent flyer points offered by airlines) accumulated as a result of traveling for University activities. Any fees or related costs of loyalty programs will not be reimbursed.

2.9.2 The University will not reimburse the Traveler for purchases made with loyalty program points. However, if points are being redeemed to purchase/pay for University-sponsored travel, the applicable, substantiated fees and taxes will be reimbursed, provided the cost does not exceed lowest logical airfare.

2.9.3 The Traveler is responsible to report, as part of their annual income tax return, the redeeming of any loyalty program points accumulated as a result of traveling for University activities and which may therefore constitute taxable benefits.
APPENDIX 1: CROSS REFERENCES


ii. McGill Guidelines for Student travel: University Secretariat | University Policies, Procedures and Guidelines | Students | Other Documents Relevant to Students | International Mobility Guidelines

iii. McGill Emergency Travel Assistance: Human Resources | Benefits | Insurance and Plan Details | Travel Assistance | Emergency Travel Assistance

iv. McGill Travel Guidelines: Travel Services website | Regulation and Procedures

v. Government of Canada Accommodation and Car Rental Directory

vi. Canadian Government Travel Advice and Advisories by destination

vii. Canada Revenue Agency | Benefits and allowances | Loyalty and other points programs