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| **TRAVEL Risk Planning – Guidelines from Risk Management**  **Travel is a special type of risk planning. The following is provided for your assistance. For additional help in travel RISK planning, feel free to contact Risk Management at (208) 885-7177. For international travel, contact the International Programs Office at (208) 885-8984. FISCAL questions about travel should be directed to Travel Management at (208) 885-5379.**  **Questions shown below are not all-inclusive, but are given as samples.** | |
| **OBJECTIVE**   * **WHY?** | What is the objective of your travel? It may seem obvious, but it is critical to risk planning to determine your overall objective. (Your travel objective, should, of course, support the university’s overall strategic objectives.) |
| **AUTHORIZATION** | BEFORE YOU TRAVEL - document your authorization to travel as required by your unit: email, leave request, and/or web travel form. You are responsible reading, understanding, and following all university policies regarding travel. No one is authorized to disregard these policies. The policies are subject to change. This document is a guideline, but the actual policies will determine travel reimbursement and risk and insurance coverage.  **Travel & Entertainment** – several policies - <https://www.uidaho.edu/finance/controller/accounts-payable/travel-services/travel-forms-and-policies>  **Vehicles** - <https://www.uidaho.edu/dfa/administrative-operations/business-services/risk-management/insurance> then click Vehicle Use and Coverage  **Charter Aircraft** - <https://www.uidaho.edu/dfa/administrative-operations/business-services/risk-management/insurance>, then click Aviation Coverage  **Foreign Liability & Travel Assistance Services** - <https://www.uidaho.edu/academics/ipo/ui-faculty-staff-opportunities/international-travel>  Additionally, there are websites that can provide additional information. See RESOURCES below. |
| **ACTIVITIES** | Once you’ve determined your travel objective, what activities are you choosing to help you reach that objective? |
| * **WHO** | Students, staff, faculty? # of people going? Any minors? Supervision required? Experience level of group? |
| * **WHERE** | **ALL international travel MUST be referred to International Programs Office**  FILE YOUR ITINERARY with trusted staff who can assist if an emergency arises  Itinerary? Rural or metro travel? |
| * **WHEN** | Dates and duration of your travel  Employees traveling more than six months or on sabbatical should REFER TO RISK. |
| * **WHAT** | Types of activities? |
| * **HOW** | Mode of transportation? Vehicle? Air? Lodging? |
|  | **Vehicle transportation - TIPS**   * Vehicle coverage is determined by the TITLE of the vehicle. * UI owned vehicles have coverage through the State of Idaho’s program of risk and insurance. Coverage includes liability at $500,000 and physical damage. The deductible is $1,000 comprehensive and collision. BY STATE LAW, ADDITIONAL COVERAGE MAY NOT BE PURCHASED. Losses go against the university loss history. Drivers must be qualified to drive UI vehicles. See the [Standards for University Owned, Rented, or Leased Vehicle Use and Coverage.](https://www.uidaho.edu/-/media/UIdaho-Responsive/Files/division-of-finance-and-administration/administrative-operations/business-services/Risk-management/standards-for-university-owned-rented-or-leased-vehicle-use-and-coverage.pdf?la=en&hash=D6DABB54D46F43114716BA6A88E3CA3BC9259DFD) * Personal vehicles used for university business are subject to the limits of your personal policies, and losses will go against your personal history. * If you are authorized for university travel, rental vehicles WITHIN THE U.S. must be rented through the State’s auto rental contract found on UI Accounts Payable’s [Travel](https://www.uidaho.edu/finance/controller/accounts-payable/travel-services/transportation) webpage. Rentals may be rented without purchasing additional rental car coverage from the rental car agency. IMPORTANT EXCEPTIONS APPLY. YOUR DIVISION OR UNIT MAY APPLY TO RISK FOR ADDITIONAL RISK TRAINING or exceptions BY CONTACTING [risk@uidaho.edu](mailto:risk@uidaho.edu). * Carry an “[accident claims guide](https://www.uidaho.edu/-/media/UIdaho-Responsive/Files/infrastructure/PSS/Risk-management/University-Auto-Accident-Kit.pdf?la=en&hash=244C67A6A28733E5A62C30DB455881855F77C8B8)” with you if you travel in a UI or authorized rental vehicle. * Learn about better fiscal options for rental cars at the travel management website. Rates and damage deductibles vary depending on how you rent the vehicles. Deductibles can vary from $0 to $2,500. See <https://www.uidaho.edu/finance/controller/accounts-payable/travel-services/transportation>.   **International travel – REFER TO IPO**  While Risk has a travel assistance services policy available, you will want to compare it to others available. A good website is at insuremytrip.com or [International Programs webpage.](https://www.uidaho.edu/academics/ipo/ui-faculty-staff-opportunities)  These packages vary widely in types of coverages and pricing.  The risk and insurance program of the State of Idaho offers little international coverage for any traveler.  Registration of all travelers is a necessity for emergency and security management. |
| **RISK LEVELS?** | Regarding these activities, **WHAT KEEPS YOU UP AT NIGHT?** |
|  | Types of activities? Low, moderate, high risk?  What is the probability of these risks occurring?  What is the impact on your objectives if this risk occurred?  Where would these risks fall on the chart below?  Green = Go but consider **controls** and **transfer**  Yellow = Proceed with caution (controls, resources, transfer)  Red = **Stop** and refer   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Probability** | **High** | **Moderate injury** | **Rape**  **Assault, battery**  **Individual misconduct**  **Need to evacuate an individual** | **Need to evacuate group due to:**  **Medical**  **Natural disaster**  **Civic unrest** | | **Med** | **Problems with itinerary** | **Chaperone misconduct** |  | | **Low** | **Minor injury**  **Minor theft** |  |  | |  |  | **Low** | **Med** | **High** | |  |  | **I m p a c t** | | | |
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| **RISK CONTROLS** | Regarding these activities, what controls are in place? **Are these controls effective**?  Plans should be site-specific (i.e., rural v. metro) |
| **RISK DECISION** | **AT THIS POINT, REGARDING OUR ACTIVITIES, DO WE CHOOSE TO MAKE ANY CHANGES?**  **Can we make any activities safer by improving controls?**  **We are going to keep the same OBJECTIVE.**  **But we can modify our ACTIVITY to achieve the OBJECTIVE.** |
| **Trip Specific** | What plans are in place to make sure itinerary and activities proceed? What are the backup plans? |
| * **Safety** * **Emergency** * **Security** | Make and file plans prior to departure. |
| **RISK TRANSFERS**  **RESOURCES** | **Contracts must be signed by University Purchasing. Insurance & Risk must be reviewed by University Risk.** |
| * **Trip Specific** | Has this trip been asked to sign any kind of document? If so, refer to Purchasing. |
| * **Contracts** | Does our group need to work with OSP, Purchasing or other units to support our planned activities? |
| * **Insurance & Risk Mgmt** | Vehicle insurance  Waivers  Camp insurance |
| **FISCAL PLANNING** | Consult with Administrative Support in planning stages. Consult guidelines such as “Paying for travel” |
| **COMPLIANCE** | Is this trip subject to any compliance issues related to federal, state or local laws or regulations? |
| * **Trip Specific** |  |
| * **Grants** | Reports |
| * **International** | Visas |
| **PRE-TRAVEL Forms** | Travel Authorization?  Web Travel Form? |
| **TRAVEL INCIDENTS** | If something happens during the trip, to whom do I report? Do I know how to escalate that report?   * Follow pre-planned emergency plan * Incident Report |
| **POST-TRAVEL Forms** | * Complete web travel form * Complete any needed incident reports   Complete any required grant reports |
| **PROCESS IMPROVEMENT** | What did I learn during this trip that would improve MY next trip, or the university’s travel process? |