

## ***Frequently Asked Questions Regarding Updated Guidelines for Staff Travel and Purchasing (Updated as of November 2, 2020)***

### **General**

Q. When are the policy changes effective?

A. All policy updates are effective as of November 2, 2020.

Q. How long will the policy updates be in effect?

A. When the University returns to normal operations following the pandemic some, policy requirements related to prior written approval for staff, laptop, desktop, and monitor refresh lifecycle may be revised. It is the intention that the policy updates will remain in immediate effect until further notice.

Q. Where can I go for more information?

A. Visit the [University's Policy 1202 website for detailed information](#). Additionally, questions can be routed to the Shared Services Help Desk at 773-702-5800 or [online](#).

### **Travel, Meals, and Expenses**

Q. Do the policy updates change the University's guidance related to the COVID-19 pandemic?

A. No. Travel policy updates do not change the University's COVID-19 travel restrictions, which remain in effect. The University is continuing the suspension of University-sponsored international and domestic travel until further notice due to COVID-19. Please visit [goforward.uchicago.edu/travel](https://goforward.uchicago.edu/travel) for the latest information on the University's pandemic travel guidance.

Q. What is required for prior written approval for travel from unit-level Associate Dean, Associate Vice President, or equivalent for the President and Provost Office ("Senior Administrator")?

A. The University is continuing the suspension of University-sponsored international and domestic travel until further notice due to COVID-19. Please visit [goforward.uchicago.edu/travel](https://goforward.uchicago.edu/travel) for the latest information on the University's pandemic travel guidance.

When travel is allowed, the unit-level Senior Administrator should provide prior approval for all staff travel in advance of booking. This prior approval must be documented electronically in an email or signed memo and included with required receipts in GEMS for the expense reconciliation process.

Failure to provide approval documentation may result in delay or denial of expense reimbursement. Violations of this policy requirement may result in corrective action, and in

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some cases, may be escalated to unit and Office of the Provost senior leadership. See [Policy 1202](#) for more details.

Q. I am a staff member who books travel for faculty. How do these policy updates apply to my bookings?

A. We recommend that all University travel, including travel by faculty, be booked using the University's [preferred travel agency](#) going forward. Staff who book travel on behalf of faculty should indicate in the booking notes the name and role of the traveler (e.g., faculty, OAA, staff).

Q. I have previously used livery cars. What should I use for transportation?

A. Usage of livery vehicles for staff is not permitted (e.g., black car service, including rideshare black car service). Staff should seek the most cost-efficient means of transportation. Taxi or rideshare services are generally more cost-efficient and readily available. Regular fare rideshare service is permissible, but not rideshare premium/black car services. See the [University's travel site](#) for more information on travel vendors and resources.

Q. What are the meal and catering policy restrictions?

A. Staff meals and catering will be limited to \$30 per person and will require prior written approval of a unit-level Associate Dean, Associate Vice President, or equivalent for the President and Provost Office ("Senior Administrator").

Prior written approval must be documented electronically in an email or signed memo and be included with required receipts in GEMS for the expense reconciliation process. Failure to provide approval documentation may result in delay or denial of expense reimbursement. Violations of this policy requirement may result in corrective action, and in some cases, may be escalated to unit and Office of the Provost senior leadership.

Q. I am planning an event or travel in the Winter Quarter. Do these policies apply?

A. Yes.

Q. Can I use my personal credit card for authorized University business expenses?

A. For staff with a University issued [GEMS credit card](#), this card must be used for all University travel expenditures and small-dollar purchases whenever possible, as opposed to using a personal credit card. Usage of the GEMS credit card by faculty and staff for University business expenses is considered a best practice.

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Q. What are the eligibility criteria for a mobile phone stipend?

A. Staff may be eligible for mobile phone stipend reimbursement when their job requirements justify a mobile phone and they are regularly required to use their personal mobile phone to perform their job duties. On average business usage must represent at least 50% or more of total phone usage each month to qualify for a stipend. Unit leaders may implement similar guidelines for their entire unit (i.e., applicable to staff, faculty, and others) as required for budgetary purposes.

Q. If I have a University-issued mobile phone what are my options?

A. Unit Associate Deans or Associate Vice Presidents will be provided information on their unit's active mobile phone plans. In general, staff will have the option to cancel or transfer their mobile phone to a personal paid plan. If applicable, staff may have the option to request a mobile phone stipend, subject to obtaining the required approval from unit leadership.

### **Purchases**

Q. I already have an individual printer. Will I be able to continue to purchase toner and paper?

A. Policy updates are applicable to the purchase of new individual printers. Staff should coordinate with their unit leadership on purchasing decisions regarding other permitted items.

Q. I am a staff member who purchases IT equipment for both faculty and staff. What is the new process?

A. University IT Services and Procurement are in communication with local unit IT buyers. Staff should continue to follow their current process but will be required to provide the name and role of the individual receiving the equipment (e.g., faculty, OAA, staff).

Q. What are the requirements to purchase a new or replacement laptop or desktop PC?

A. The refresh lifecycle for staff replacement laptops, desktops, and monitors should be extended to at least four years across campus. Whenever possible, monitors should be reused rather than buying new ones.

In limited circumstances, where there is a new hire or in the event of hardware failure, new computers may be purchased outside these parameters. Exceptions must be approved by the unit Associate Dean, Associate Vice President, or equivalent for the President's or Provost's Offices. (Note: Purchases using external funded grants are excluded.)