Procedure for Familiarization Visits

NOT IN EFFECT UNTIL JANUARY 1, 2027



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Effective Date: 2027-01-01

Responsible Unit: Office of the Associate Vice-President (Finance) and Chief Financial Officer

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Familiarization Visit: Offered in certain situations when an offer of employment and acceptance of that offer is in place. It is intended for eligible new appointees to meet with colleagues regarding curriculum and research matters and/or to become familiar with the unit.

Receipt: The proof of travel expense payment required to support the amount requested for reimbursement on a travel expense claim.

Relocation: travel conducted by a newly appointed employee and the new employee's spouse/partner and dependent children to relocate to their new place of employment with the University.

Traveller: any member of the University Community making a claim under the terms of University travel policy and procedures.

Unit Head: Those holding the responsibility of a unit's budget and activities (or their delegate), with the authority to approve travel and the ability to assess that such travel is necessary, reasonable, legitimate, and appropriate.

University: Memorial University.

Procedure

1. General

1.1. This procedure supplements the *Travel Expense Management Policy* and related policies and procedures and should be read together with those documents. Where a Traveller is subject to a contract or agreement that requires alternative arrangements, those arrangements will be supported during the authorization and claims process with such provisions attached.

1.2. Travellers should consult their Unit Head, unit financial administrator and / or Financial Services when clarification is required.

1.3. Familiarization Visit travel arrangements may be handled through one of the following options:

a) Arranged and paid directly by the recruiting unit.
b) Arranged and paid by the Traveller and reimbursed to the Traveller after the visit.
c) A combination of options (a) and (b).

2. Authorization

2.1. Upon approval of an appointment of a candidate for two or more years by the appropriate Vice-President or the Associate Vice-President (People & Culture), one Familiarization Visit may be permitted for an appointee and their spouse/partner or a dependent child, where budget allocations allow.

2.2. Familiarization Visits must be pre-authorized by the appropriate Unit Head using the *Visitor Travel Form*.

2.3. For any travel expense not provided for under this *Procedure,* application must be made to the Vice-President (Finance and Administration) for further authorization as a Travel Deviation if first approved by a Unit Head.

3. Reimbursable Expenses

3.1. Familiarization Visit expenses for an appointee and spouse/partner or a dependent child will be reimbursed as follows with the authorization of the Unit Head and Receipts:

a) Transportation to and from the destination of the Familiarization Visit will be reimbursed at the most economical and reasonable mode of transportation available, and in any event, should not exceed economy fare from the airport closest to appointee's place of residence, to the airport nearest the appropriate campus of the University.

b) Vehicle rentals may be reimbursed at the discretion of the Unit Head if considered the most economical and efficient mode of transportation during the visit.

c) The cost for a standard room in commercial accommodations, or the nightly rate for private accommodations will be reimbursed to a maximum of three (3) nights.

    (i) At the discretion of the Unit Head, the three-night maximum may be combined with the maximum of seven (7) nights provided for in

the *Procedure for Relocation and Removal* for a maximum combined total of ten (10) nights.

(ii) Private accommodations (i.e. staying with friends or family) will be reimbursed as per the Schedule of Reimbursable Expenses. The rate is reimbursed nightly per family, and not per night, per Traveller.

d) Appointees and their partner/spouse or a dependent child will be reimbursed for meal per diems and incidentals as per the Schedule of Reimbursable Expenses.

e) Appointees may be hosted for meals by the University during their Familiarization Visit in accordance with the Hosting policy. Appointees may not claim hosting expenses themselves during the visit.

(i) When a candidate has been hosted for a meal by the University, that meal must be removed from the appointee's meal per diem claim for that day.

4. Expense Reimbursement

4.1. After completion of the Familiarization Visit and when an appointee has paid for their own travel (see Section 1.3 above), the appointee will complete a *Travel Claim Form* with original Receipts (where required) and submit the claim for approval to their Unit Head as per the *Procedure for Travel Claims and Reimbursement.*

4.1.1. When a Familiarization Visit is combined with Relocation, the appointee shall refer to Expense Reimbursement section within the *Procedure for Relocation and Removal* instead of this section.

4.2. When an appointee chooses to relocate by an indirect route or transportation method that extends travel time and cost, the appointee will be reimbursed for their actual cost of travel with Receipts to a maximum of the estimated cost of the most reasonable travel route by the most cost-effective means of transportation.

Related Documents
Procedure for Relocation and Removal
Procedure for Travel Authorization
Procedure for Travel Claims and Reimbursement
Procedure for Travel Expense Management
Schedule for Reimbursable Expenses

Travel Claim Form
Visitor Travel Form

Policies using this Procedure:
Hosting Policy
Travel Expense Management Policy
Travel Outside of Canada Policy