Update on Guidelines, Policies, & Procedures

March 2021

Notable changes to previous policies or procedures include:

**USE OF A PROVIDER OR PARTNER TO MANAGE LOGISTICAL ASSESSMENT AND SUPPORT**

TAMU programs (Limited and Standard Faculty-led and Field Trips) require the use of a provider (education abroad provider, partner, vendor) with a fully executed International Service Provider (ISP) contract in place.

- Existing ISP contracts can be verified at [https://tamu.moveonca.com/publisher/1/eng](https://tamu.moveonca.com/publisher/1/eng)
- A list of customized education abroad program providers is available from Education Abroad and will be included on the EA website, in the Proposal Portal, and shared with College Liaisons.
- Education Abroad strongly encourages the use of education abroad program providers who provide:
  - On-the-ground logistics
  - Lodging arrangements
  - Booking flights (if required or requested depending on program type)
  - Organizing meals
  - Facilitating guided tours
  - Arranging guest lectures
  - Risk Management
  - On-site student support

- Education abroad program providers are travel experts skilled at planning logistics specifically for study abroad groups which allow faculty to invest their time in planning and executing program academics.
- Vendors provide a specific service (hotels, bus companies, and tour guides) but not holistic program development and support.
- Partners generally refer to previously established institutional relationships such as exchange partner universities. While partners may be able to provide some assistance with housing or classroom space, they do not generally provide holistic support (on-site assistance, student support, risk management, logistics assistance, etc.).
- A program provider vets all on-site vendors (such as bus companies and hotels) and manages those contracts and payments allowing Texas A&M to contract and work with one partner. They provide a customized, comprehensive package that adheres to the program guidelines and offers risk mitigation and emergency support.
- Although it is possible to have more than one provider, it is not recommended. The office managing the program (EA or college/department) will be responsible for reviewing and approving the logistical structure and will strive to find the best provider or partner to meet the needs of the program.
- On faculty-led programs, international flights are purchased by students. EA is now working with the travel agency Student Universe for airfares and to make group reservations. Please contact us for information.

**REDUCTION OF WORKING FUNDS IN FACULTY-LED AND FIELD TRIP PROGRAMS (15% OR LESS)**

- These policies should be applied consistently across program types (limited/standard faculty-leds, field trips).
- Tips, occasional entrance fees, some group meals are examples of working fund expenses.
- Resources from AABS with additional information will be shared with College Liaisons.
DART CARD POLICY FOR PROGRAMS MANAGED BY EDUCATION ABROAD

- Education Abroad will no longer transfer program funds (fees collected from students) to personal bank accounts. All program leaders will be required to use a University DART card that will be issued by the business office managing the program finances.
- Education abroad will upload the program working fund (for payment onsite) on the DART card (for programs managed by EA). Funds for the group of participants can no longer be transferred to the faculty bank account.
- Transactions are tied to the individuals Concur account in SSO and reported on the Concur expense report.
- Expenses can be allocated to multiple accounts, including those with different campus codes.
- The differences between a DART Card and a Travel Card is the DART card is a declining balance card and can be set to allow ATM cash withdrawals.
- NOTE: Programs managed by departments/colleges should also use the University DART card for the program working fund and should not transfer fees collected from students to personal bank accounts.

NEW TAX REGULATIONS

- All pre-departure and in-country payments for services to foreign vendors not publicly owned require a W8-BEN (Individuals), or W8-Ben-E (Foreign Corporations, partnerships, trusts, or beneficial owner claiming foreign status or treaty benefits). NOTE: This new regulation includes all payment amounts, not just for expenses $600 or more in value.
- Faculty can use the meal log to record all faculty in travel status meals in lieu of submitting the required foreign vendor tax form if they are issued a cash advance.
- If expenses are paid with a DART card, Citibank takes care of obtaining the foreign tax forms from the vendor for Texas A&M with the exception of ATM cash withdrawals. Any expense paid with the cash from the ATM cash withdrawal requires the W8-Ben, or W8-Ben-E to be submitted along with the receipt.

ALL TAMU PROGRAMS REQUIRE AT LEAST TWO RESPONSIBLE LEADERS

- Leaders can include an approved TAMU employee (a second teaching or non-teaching faculty, graduate assistant, or TAMU staff).
- In some cases, a second leader may be an in-country partner dedicated to the group throughout the program. To be demonstrated in advance for risk assessment and support.
- Spouses, dependents, or visitors do not qualify as second leaders and cannot be responsible for program management or oversight of students.

RISK ASSESSMENT (COVID-19 SPECIFIC AND BEYOND UNTIL FURTHER NOTICE)

- A full assessment of the host location, including the availability, accessibility, and expense of healthcare and COVID-19 testing is required for all locations. Assessment includes a review of:
  - Entry and exit requirements and the likelihood that existing measures will become more stringent (the new variants are a concern);
  - Testing protocols, including delivery of results within required timeframes;
  - Possible vaccination requirements;
  - Quarantine requirements – length of, test out scenarios, and any tracking requirements;
  - Quality of the in-country experience such as movement restrictions in host city and from one city to another, access to meals, ability to engage in field visits and cultural activities.
- NOTE: Programs and measures may be reassessed if new restrictions are placed in the country that will be visited. EA, managing units, and trip leaders will work together to follow updates and mitigation plans.

NEW FEES – See website.

**Rules apply regardless of program type or service level (risk management, financial, EA specific, etc.)**