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Parent Policy: Hazard Management Assignment of Accountability
Health, Safety, and Environment Policy

Off-Campus Activity and Travel Procedure

Office of Administrative Responsibility:	Health, Safety and Environment
Approving Authority:	Provost and Vice-President (Academic) Vice-President (University Services, Operations and Finance)

Purpose

As a research-intensive university with a global reach, members of the University Community participate in an extensive range of Off-Campus Activity and Travel including Administrative Affairs, and participate in Academic Programs, Field Research, Registered Student Groups, Campus and Community Recreation programs, Varsity Athletics, and Faculty-Managed Student Groups. Health, safety, environmental and security stewardship are shared responsibilities between the traveller and university, including the assessment of risk and creating and implementing comprehensive plans to manage or mitigate risks when participating in University Affairs.

The purpose of this policy document is to outline the requirements and processes that members of the University Community must follow when participating in University Affairs that involve Off-Campus Activity and Travel. This includes making all members of the University Community aware of the support available to them for any liability or medical issue that may arise when involved in Off-Campus Activity and Travel.

Definitions

The attached definitions table outlines the terms used in this policy document and any specific rules of interpretation that apply.

Scope

This policy document applies to all members of the University Community involved in Off-Campus Activity and Travel. This procedure does not apply to activities within the same municipality as

the campus such as meetings, conferences and social events, but does apply to Field Research, Field Trips and Field Schools that are undertaken within the same municipality.

Procedure

1. RESPONSIBILITIES

   If the Off-Campus Activity and Travel involves one individual, that individual is responsible for following this procedure and the associated processes.

   If the activity involves a group, the group leader is responsible for following this procedure and the associated processes, taking into consideration the competency of each individual member of the group for the activity. It is important to understand that members of the group are not expected to have the same competency as the most experienced member. All members of the group must follow this procedure and the associated processes.

   In most cases there will be a person of authority, such as a faculty or staff member, who is the group leader and assessor. In cases where there is not, such as extra-curricular trips planned by Registered Student Groups or club sports programs, one of the student participants must act as the leader and assessor for the entire activity and follow this procedure and the associated processes.

2. OFF-CAMPUS ACTIVITY AND TRAVEL REQUIREMENTS

   For the purposes of this procedure Off-Campus Activity and Travel is divided into the following four categories: Administrative Affairs; Academic Programs; Field Research; and Registered Student Groups, Campus and Community Recreation Programs, Varsity Athletics.

   Refer to the category that applies to the purpose of travel. If travel involves more than one purpose (e.g., Administrative Affairs and Field Research), the procedures for both categories of travel apply.

   a. Administrative Affairs

      i. If travelling domestically and participating in Administrative Affairs you are encouraged to follow the domestic portion of the Checklist for Domestic or International Off-Campus Activity and Travel Involving Administrative Affairs.

      ii. If travelling internationally and participating in Administrative Affairs all travellers must:

         1. Refer to the Off-Campus Activity and Travel Requirements page to complete a risk assessment. If the country(ies) attended are identified by Global Affairs Canada (GAC) as AVOID NON ESSENTIAL TRAVEL or AVOID ALL TRAVEL, necessary approvals must first be obtained as indicated on the risk assessment page.

         2. Register travel with International SOS (ISOS).[1]

[1] *If air travel was booked through Maritime Travel, ISOS registration is automatic. If air travel was booked through other means, refer to Off-Campus Activity and Travel Requirements for how to register with ISOS.*

3. Complete the international portion of the *Checklist for Domestic or International Off-Campus Activity and Travel Involving Administrative Affairs*.

iii. All applicable policies, procedures and processes as established by the university must be followed.

b. Academic Programs

i. For all Off-Campus Activity and Travel involving Academic Programs (AP) it is the responsibility of the academic program leader to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment and obtain the necessary approvals as indicated on the risk assessment page.

ii. For an AP involving domestic travel that is assessed at a risk level of 1 (low), complete the Checklist for Domestic Off-Campus Activity and Travel Involving Academic Programs.

iii. If the AP is associated with Field Schools or Field Trips, the faculty is to engage the Field Research Office (FRO) to determine if the HSE Requirements for Field Schools and Field Trips (Appendix) is to be followed.

iv. If the AP involves international travel the faculty is to engage International Education and Enrolment (IEE), (formerly University of Alberta International) to review the hazards, controls, and risk level.

v. If the AP is offered by IEE, it is IEE's responsibility to assess the hazards, controls and risk level and approve the program using the *Off-Campus Activity and Travel Requirements* risk assessment.

vi. All participants in an AP and undertaking international off-campus activity that does not require a FASP, must register in UGo.

vii. All applicable policies, procedures and processes as established by the university, faculty, Health, Safety and Environment (HSE), the FRO or IEE, in the application of the *Off-Campus Activity and Travel Requirements* risk assessment, must be followed.

c. Field Research

i. Refer to the *Off-Campus Activity and Travel Requirements* page to complete a risk assessment.

ii. If the risk level is 1 (low), complete the Checklist for Domestic or International Off-Campus Activity and Travel Involving Field Research.

iii. If the risk level is 2 (medium) or higher, a Field Activity Safety Plan (FASP) or Human Participant Field Activity Safety Plan (H-FASP) must be completed including an assessment of risk. In limited cases a FASP or H-FASP may not be required due to low risk field activity occurring in a geographic location assessed as moderate risk. In these cases contact fieldoff@ualberta.ca for clarification.

1. Once the FASP or H-FASP is completed, researchers must register the FASP or H-FASP by uploading it to the Field Activity Safety Plan (FASP/H-FASP) Central Registry (Google Form). The FASP or H-FASP will be reviewed and sent for approval. Refer to the Field Research Planning page for more details.

iv. Regardless of risk level, if travelling internationally, all travellers must register their travel with ISOS.[2]

v. All applicable policies, procedures and processes as established by the university, faculty, HSE and the FRO in the application of the *Off-Campus Activity and Travel Requirements* risk assessment, must be followed.

d. Registered Student Groups, Campus and Community Recreation Programs, Varsity Athletics

i. For all domestic Off-Campus Activity and Travel:

1. If it involves a Registered Student Group (RSG) it is the responsibility of the Office of Student Success and Experience (SSE) to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page.

2. If it involves a Campus & Community Recreation (CCR) program, it is the responsibility of CCR to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page.

3. If it involves Varsity Athletics (VA) it is the responsibility of Athletics to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page.

ii. For all international Off-Campus Activity and Travel:

1. All travellers must register in UGo.

2. If it involves an RSG it is the responsibility of SEE to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page. SEE is to engage IEE for the purposes of reviewing the hazards, controls and risk level.

3. If it involves a CCR Program it is the responsibility of CCR to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page. CCR is to engage IEE for the purposes of reviewing the hazards, controls and risk level.

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[2] *If air travel was booked through Maritime Travel, ISOS registration is automatic. If air travel was booked through other means, refer to Off-Campus Activity and Travel Requirements for how to register with ISOS.*

4. If it involves VA it is the responsibility of Athletics to assess the hazards, controls and risk level using the *Off-Campus Activity and Travel Requirements* risk assessment, and obtain the necessary approvals as indicated on the risk assessment page. Athletics is to engage IEE for the purposes of reviewing the hazards, controls and risk level.

iii. All applicable policies, procedures and processes as established by the university, the SEE, CCR, Athletics, faculty, or IEE in the application of the *Off-Campus Activity and Travel Requirements* webpage risk assessment, must be followed.

e. All Members of the University Community

Regardless of who is travelling, in addition to the above, if you are a member of the University Community and your travel involves University Affairs, the following applies:

i. All members of the University Community while involved in University Affairs are provided Liability Insurance and Property Insurance and are provided with or can access Travel Medical Insurance. The specific policy that would apply to any one situation is dependent on the situation and policy exclusions. The university also provides access to ISOS who can assist a traveller to the most appropriate medical services in their location of travel, and if required, provide evacuation services in an emergency situation.

ii. All travellers are responsible for determining if there are any exclusions to their Travel Medical Insurance coverage based on the Global Affairs Canada (GAC) travel warning level. If you are not sure about your insurance coverage it is your responsibility to contact your travel insurance provider. For employees this is through staff benefits. For students this is the Graduate Students' Association or the University of Alberta Students' Union.

iii. Review the *Travel Processes and Expense Procedure* for allowable expenses. If expenses are incurred that are not eligible for reimbursement, the individual traveller will be responsible for those costs. This would include costs that would be expected to be covered by travel insurance, but due to the location of travel, are excluded from insurance coverage.

iv. If members of the University Community are travelling with U of A research, data, or information, it is recommended that they consult the Far from Home travel security guide and the Travel security guide for university researchers and staff. If the purpose of the travel relates to a Sensitive Technology Research Area - particularly where the assessed risk level is 2 (medium) or higher - travellers should consult the Safeguarding Research Office (SRO) for guidance. The SRO is available to provide travel security briefings for faculty and graduate or postdoctoral scholars engaged in research-related international travel.

v. If members of the University Community are travelling with University of Alberta devices (phone, computer) to a destination assigned a risk level of 2 (medium) or higher using the Off-Campus Activity and Travel Requirements webpage risk assessment, they must contact IST prior to travelling. Consult IST's Travel Safely With Your Electronics guide,

the university's guidance on Working Remotely and the *Information Technology Security Policy*.

vi. If members of the University Community are travelling with information or goods which are export-controlled, it is their responsibility to adhere to applicable licensing or permitting requirements. If unsure, travellers can consult *Customs Brokerage Services* and/or the *Safeguarding Research Office*.

3. CANCELLATION AND RECALL

Following approval and prior to travel, if there is a change in circumstances and after careful consideration of the situation by a University Official, it is believed the risks are unacceptable or unwarranted and cannot be reasonably managed, the appropriate University Official will cancel the Off-Campus Activity and Travel.

If a member(s) of the University Community has already commenced travel, and there is a change in circumstances and after careful consideration of the situation by a University Official, it is believed the risks are unacceptable or unwarranted and cannot be reasonably managed, the appropriate University Official will recall the member(s) to the university. Should a member(s) of the University Community choose not to be recalled, that member(s) will be considered to be undertaking Personal Activity and the university is under no obligation to provide assistance at a later date, reimbursement of costs and assumes no liability. This does not apply to a member(s) who is unable to comply due to reasons beyond their control.

Any challenge of a decision by a University Official to cancel travel or recall travellers may be considered by the Provost whose decision will be final.

Any member(s) of the University Community who fails to return from off-campus activity or travel after being recalled may be subject to sanctions or provisions under the *Student Conduct Policy* or applicable employee agreement.

Definitions

Any definitions listed here apply to this policy document only with no implied or intended institution-wide use. For clarity, defined terms listed here include grammatical variations thereof.	
Administrative Affairs	Administrative Affairs involves participation by members of the university staff, postdoctoral scholars and volunteers in administrative or similar activities such as meetings, conferences, undertaking a sabbatical or administrative leave, participating in a faculty exchange or teaching opportunity, but excludes participation in Academic Programs, Field Research, Registered Student Groups, Campus & Community Recreation Programs or Varsity Athletics.
Academic Programs	Academic Programs are those programs established by a Faculty or International Education and Enrolment (IEE) and are offered to students of the University of Alberta including practicum placements,

	Faculty-Managed Student Groups, and travel abroad programs. The programs may or may not be for course credit. Academic Programs also include those instances in which students are travelling for the purposes of attending a meeting, conferences or similar and when undertaking research is not the primary purpose of the trip.
Campus & Community Recreation Programs	Campus & Community Recreation Programs include: ● Club Sports Programs - Student-led recreational, performance, competitive athletic and aesthetic sport-based groups managed by Campus & Community Recreation (CCR). ● Adventure Programs - Adventure programs are registered programs coordinated by CCR full-time staff and led by professional 3rd party-organizations (not led by students).
Faculty-Managed Student Groups	Student-led groups engaged in experiential and/or co-curricular activities that are managed by a faculty such as the Faculty of Engineering project groups.
Field Activity Safety Plan (FASP)	A FASP (formerly the Field Activity Plan) is a document to be completed by a Field Researcher prior to entering the field. Its primary purpose is to enhance field safety for the Field Research team and to ensure there are appropriate emergency response procedures in the event of an incident.
Field Research	Any off-campus research activity undertaken by members of the University Community to collect, generate or analyze all forms of data, including but not limited to environmental, biological, archival, ethnographical, anthropological, library or other research, reconnaissance Field Trips to locate suitable field sites or visits to a host institution, industrial or construction site. In the case of travel for the purposes of attending a meeting, conferences or similar and when undertaking research is not the primary purpose of the trip, the activity would not be considered Field Research.
Field School	An academic program offered for credit by a faculty and is specifically designed to prepare students to undertake Field Research.
Field Trip	An off-campus activity that is confined to a day trip and no overnight accommodations.
Human Participant Field Activity Safety Plan (H-FASP)	An H-FASP is a document to be completed by those Field Researchers who are undertaking human participant research field activities, prior to entering the field. Its primary purpose is to enhance field safety for the Field Research team and to ensure there are appropriate emergency response procedures in the event of an incident.

International SOS (ISOS)	ISOS is a service provider available to all University Community members when travelling outside of Canada. In addition to providing trip planning services to any location in the world, ISOS sends out travel alerts and can assist travellers during travel with directing a traveller to the most appropriate medical services, or providing evacuation services in an emergency situation.
Liability Insurance	This insurance covers University Community members for any claim that they may incur that results in bodily injury or property damage to another party whilst conducting University Affairs. Coverage applies from the time the community member leaves their place of residence on the day of departure until they return to their place of residence. Coverage would not apply if the claim was not related to University Affairs.
Off-Campus Activity and Travel	Activity and travel undertaken by a member of the University Community that takes place away from university owned, leased or rented property for reasons related to University Affairs. This includes, but is not limited to Academic Programs, Field Schools, practicum placements, Field Research, faculty or student exchanges, conferences and seminars, extra-curricular activities such as Varsity Athletics and discipline-based competitions, and trips organized by Registered Student Groups or Campus & Community Recreation Programs. With the exception of Field Research, this does not include activities within the same municipality as the campus (eg: meetings, conferences and other similar activities within Edmonton or Camrose).
Personal Activity	Any activity that is not part of University Affairs. In the case of Field Research, if you are in an isolated location, you are no longer working on your Field Research, but you are required to stay in that location and undertake support activities (cooking, getting gas or food etc.) this is still considered part of Field Research. If you choose to participate in any extra-curricular activity (e.g. boating, hiking, ziplining etc.) that is not associated with your Field Research or support activities, it would be considered Personal Activity.
Property Insurance	Covers university owned property, or property the university has assumed the responsibility to insure by contract or agreement, from physical loss or damage. This coverage applies at all times the university owns or is responsible for the property. There are standard property exclusions. For more detail see here.
Registered Student Groups	A group of students that has applied for and been granted recognition by the Office of Student Success and Experience as per the *Student Groups*

	Procedure. Examples include, but are not limited to, extracurricular clubs, faculty, department and residence associations, faith-based groups, and fraternities and sororities.
Travel Medical Insurance	Employees of the university are provided travel medical cover through staff benefits. Students are provided cover from their student association (if opted out equivalent cover needs to be obtained prior to travel). If there is a medical incident when off campus, the travel medical cover is designed to respond, even when not conducting University Affairs. Each location of travel may impose specific circumstances on the individual traveller that affects their own personal needs. Each traveller should therefore review their personal needs against this cover and determine if additional insurance is required. Any additional insurance required to be purchased for travel outside of Canada is reimbursable. See the Travel Process and Expense Procedure for the specific requirements.
UGo	UGo is the university's off-campus travel registry as administered by IEE.
University Affairs	Any activity that is directly related to or arising out of the operations of the university at any location.
University Community	All employees, (including but not limited to, academic staff, support staff and administrators), adjunct professors, professors emeriti, lecturers, clinical staff, all students (including undergraduate students and graduate students), postdoctoral scholars, contractors, volunteers, suppliers, invited visitors and those who are acting on behalf of the university or performing university related business.
University Official	For the purposes of this procedure, a University Official is an individual with authority to administer, approve, cancel travel or recall travellers for their respective unit, faculty or department, such as the Chair, Dean, Director, Associate Vice-President, Vice-President (including the Provost and Vice-President (Academic)) or President and Vice-Chancellor.
Varsity Athletics	Competitive sport teams, utilizing the Golden Bears & Pandas or Augustana Vikings name, that represent the University of Alberta in competition.

Parent Policy Suite

- Health, Safety and Environment Policy
- Hazard Management Assignment of Accountability

Related Policy Documents

- Information Technology Security Policy
- Student Conduct Policy
- Travel Processes and Expense Procedure

Related Links

- Off-Campus Activity and Travel Requirements webpage

- Checklists for Domestic or International Off-Campus Activity and Travel Involving:
    - Administrative Affairs
    - Academic Programs
    - Field Research
- Customs Brokerage Services
- Employee Travel Medical Coverage
- Far From Home: A travel security guide (Canada Security Intelligence Service)
- Field Research Planning
    - Field Activity Safety Plan (FASP)
    - Human Participant Field Activity Safety Plan (H-FASP)
    - Field Activity Safety Plan (FASP/H-FASP) Central Registry (Google Form)
- Global Affairs Canada (GAC) Travel advice and advisories (Government of Canada)
- Graduate Students' Association travel insurance
- HSE Requirements for Field Schools and Field Trips
- International Education + Enrolment (IEE) Safety & Security Abroad
- Travel safely with your electronics
- Travel security guide for university researchers and staff (Government of Canada)
- Safeguarding Research Office (SRO email)
- Sensitive Technology Research Areas (Government of Canada)
- Student Success and Experience
- Students' Union Health and Dental Plan
- UGo Travel Registry

History

- June 17, 2011 — Approved (as Off-Campus Activity and Travel Policy).
- October 31, 2024 — Editorial amendment. Formatting, office name and links.
- January 26, 2026 — Approved. New procedure under *Health, Safety, and Environment Policy* to replace previous Off-Campus Activity and Travel Policy Suite (rescinded).

For questions surrounding policy document interpretation or implementation, please contact the Office of Administrative Responsibility.

The official version of this document may be obtained from https://www.ualberta.ca/policies-procedures/index.html