Travel Policy

Responsible Officer  Chief Operating Officer
Approved by  Vice-Chancellor
Approved and commenced  June 2016
Review by  August 2018

Relevant Legislation, Ordinance, Rule and/or Governance Level Principle
Anti-Discrimination Act 1998 (Tas)
Workplace Gender Equality Act 2012 (Cth)
Australian Human Rights Commission Act 1986 (Cth)
Sex Discrimination Act 1984 (Cth)
Governance Level Principle 7 - Procurement and Contracts

Responsible Organisational Unit  Financial Services and Human Resources

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1 Objective

The objectives of the Travel Policy are to:

- facilitate travel practices supportive of the safety and well-being of University Travellers
- ensure that the University meets duty of care obligations to University Travellers;
- define responsibilities for travellers and Delegated Authorities
- avoid unnecessary or excessive travel expenditure
- ensure staff members are not out of pocket for authorised travel expenditure, neither should they receive nor recover more than is reasonable or actually incurred
- ensure the financial integrity of all University travel activities
- ensure the University’s requirement to comply with all legal (taxation) obligations such as Fringe Benefits Tax (FBT), No Private Use declarations and Travel Diary record keeping requirements.

2 Scope

This Policy applies to all:

- University of Tasmania staff travelling on University business
- enrolled University of Tasmania students travelling for study purposes
- members of Council and other University committees travelling on University business
- family members of University Travellers funded by the University
- all other travellers, including visiting scholars and visiting fellows, travelling under the University’s authority and/or funded by the University.

This Policy applies to all University travel, including domestic and international travel by air, ground and sea transportation, except travel within a home state which is outside the scope of this policy.

3 Policy Provisions

3.1 University Business

All University travel must be for University business or study purposes and be in the best interests of the University.

All University travel must only be undertaken after other alternatives have been appropriately explored.
3.2 Travel by Alternative Funding Sources

All University travel must comply with this Travel Policy and associated documents; however travel booking arrangements may be varied where:

- an external funding body requires the travel to be booked with their preferred travel agent, or
- a University Traveller personally funds at least 75% of the transport as well as 75% of total cost of travel and makes the travel arrangements themselves.

Where the above instances involve international travel, the travel itinerary must be logged with International SOS using ‘My Travel’. For details refer to the Travel Procedure.

3.3 Responsibilities

3.3.1 University Traveler Responsibilities

The primary responsibility of University Travellers is to ensure that:

- guidelines for travel are followed
- authorisation is obtained prior to travel confirmation or payment
- adequate planning is made to minimise costs, obtain the lowest logical fare, and travel is planned only around University business
- acquittal of the travel is made within 20 working days of return from University business travel
- No Private Use declarations, travel diaries, receipts and documentation for all business travel expenditure are obtained and submitted within 20 working days of return from University business travel
- only business travel expenditure is charged to the University
- travel under a research grant or contract is relevant to the grant or contract, is permissible under the terms and that sufficient funds are available
- Work Health and Safety (WHS) provisions are complied with and coverage under the University’s Insurance has been established
- a proper assessment of the risks of travel is undertaken and appropriate authorisation is sought where necessary
- the University is made aware of the University Traveller’s location at any time during the duration of travel and of any changes to booked travel arrangements.

3.3.2 Responsibilities of the Delegated Authority

When authorising travel itineraries and associated costs, in addition to other responsibilities specified in the Travel Policy and Travel Procedure, the Delegated Authority is responsible for ensuring that:

- Policy and Guidelines for travel have been followed
- budget centres are required to have adequate controls regarding travel to ensure the provisions of this Policy and related Guidelines are met. All provisions must comply with this Policy and related Guidelines
- WHS provisions have been considered and coverage under the University’s Insurance has been established
• a proper assessment of the risks of travel has been undertaken and appropriate authorisation sought where necessary
• the purpose for travel is for University business, and any personal travel or deviations for personal convenience have been identified and managed in accordance with the Policy
• travel under a research grant or contract is relevant to the grant or contract, is permissible under the terms and that sufficient funds are available
• to the extent practical, total University cost is minimised, all relevant expenses are anticipated and captured in advance of travel and funds are known to be available
• the duration and timing of travel is reasonable to meet the required commitment.

3.3.3 University Responsibilities

The University will ensure that guidelines are in place to facilitate the health and safety of University Travellers.

3.3.4 Senior Management Group Travel

To minimise disruptions to the University’s ongoing operations and reduce the risk of multiple absences, it is strongly recommended that Senior Management Team members, who are travelling in groups or more than three, do not all travel on the same flight. Separate flights should be booked under these circumstances.

3.4 Travel Authorisation

3.4.1 Authorisation for Travel

All travel, whether funded by the University or not, must be authorised using the Travel Management System in accordance with the University of Tasmania Delegations Policy and Schedule of Travel Delegations.

Travel authorisation may only be delegated where specified by the Delegations Policy and/or Schedule of Travel Delegations.

Travel must comply with any conditions regarding Department of Foreign Affairs and Trade (DFAT) warning levels or other safety considerations.

University Travellers shall notify the Delegated Authority where substantial changes are required to previously authorised (and/or booked) travel arrangements, including changes to travel dates and/or additional costs incurred.

3.4.2 Travel within Home State

Travel in the University Traveller’s home state, which for most staff is Tasmania, must be authorised in accordance with budget centre specific processes.

3.4.3 Unauthorised Travel

University Travellers undertaking unauthorised travel will not be covered by University of Tasmania travel insurance and will not have costs paid for by the
University. The University will recover costs paid by the University for any unauthorised travel.

3.5 Booking Arrangements

3.5.1 Travel Booking Arrangements

All specified University travel paid directly by the University must be booked through the University’s contracted Travel Agent (refer Travel Procedure and Travel Portal website). This includes:

- all airfares
- major rail and boat fares
- accommodation
- external car hire.

Exceptions for accommodation bookings include:
- negotiated conference rates where lower cost comparable accommodation (in close proximity) is not available
- accommodation in home state or within Tasmania
- remote accommodation for field work activities (including camping or caravan park facilities).

In addition to the above exceptions where the University’s Travel Agent is not able to source suitable and/or cost effective accommodation through their supplier network, the University Travel Agent will inform travellers that the traveller is authorised to make their own accommodation bookings by other means.

For any bookings made separate to the travel agent the following must be reported to travel.admin@utas.edu.au: traveller name, booking dates, location, accommodation provider and costs.

The University will not fund travel where arrangements or bookings do not adhere to Policy or Procedures, and reimbursement will be sought where costs have already been paid.

3.5.2 Class of Air Travel (International and Domestic)

All University travel shall be by economy class unless an exception as specified applies. Note that restricted funds cannot be used for higher class of travel unless approved in accordance with this section.

The Chief Operating Officer and/or Provost may apply further limits or restrictions on class of travel if necessary to minimise University expenditure.

Council Members

Consideration of requests for higher class of travel for Council Members will be made by the Chief Operating Officer on a case-by-case basis.
Senior Management Team

Bookings for members of the Senior Management Team may be made for higher class of travel with the authorisation of the relevant line manager. It is expected that staff would use economy class of travel for domestic short-haul flights or flights where there is no business imperative to travel in a higher class.

Employment Contract

Where a staff member’s employment contract authorises a different class of travel, bookings at a higher class of travel may be made with the provision that staff would use economy class of travel for domestic short-haul flights or flights where there is no business imperative to travel in a higher class. It is expected that the provision for higher class of travel within an employment contract will have been authorised in accordance with the Schedule of Travel Delegations.

Distinguished Professors

With the authorisation of Chief Financial Officer higher class of travel is permitted where the cost of the travel can be met by consultancy earnings, profits from running conferences or from external research contracts which specifically permit higher class of travel.

University operating funds are not permitted to be used for any component of the airfare and where possible, multiple research activities should be combined into each overseas trip.

External Funding

A higher class of travel may be permitted with the authorisation of the Chief Financial Officer where travel is fully funded and undertaken on behalf of an external organisation. Verification is required prior to seeking authorisation to travel.

Other Exceptional Circumstances

A higher class of travel may be permitted in exceptional circumstances with the authorisation of the Chief Financial Officer with a recommendation by a relevant member of Senior Executive or Senior Management Team.

The availability of restricted funds is not considered exceptional circumstances unless specifically permitted by the contract associated with those funds.

3.6 University Traveller Health and Safety and Duty of Care

The University has a duty of care to University Travellers undertaking travel for University business as per the Insurance Policy and Work Health and Safety Policy and associated Guidelines. University Travellers also have a duty of care for their own health and safety when undertaking travel.

The University has engaged an international travel risk management service to provide international travel advisory and risk management services; travellers are strongly advised to access the services provided. Refer to the Travel Procedures to access details.
International travel authorisation requests will include DFAT Travel Advisories as applicable:

- Level 1 - Exercise normal safety precautions
- Level 2 - Exercise a high degree of caution
- Level 3 - Reconsider your need to travel
- Level 4 - Do not travel (may be approved in exceptional circumstances only)

Levels 3 and 4 require risk approval as provided in the *Schedule of Travel Delegations* and authorisation requests require a careful risk assessment and documentation of the need to travel, the level of risk and strategies to minimise the risk.

The University may, based on DFAT or other Travel Advisory warnings impose a complete Travel Ban on certain destinations restricting University Traveller travel.

Where a Travel Ban is established, the University will:
- circulate information to all University staff and students as a matter of urgency
- seek to contact University Travellers in restricted areas to advise them of the Travel Ban and any subsequent return-home requirements.

University Travellers are under no obligation to undertake any travel that conflicts with DFAT or other warnings by University Travel Advisors.

3.7 Travel Insurance

Authorised University Travellers are generally covered under the University’s Corporate Travel Insurance; for exceptions refer to the University’s *Insurance Guidelines*. Workers Compensation Insurance provisions may also apply for domestic travel.

3.8 Support for Staff with Carer’s Responsibilities

The University will reimburse any staff with carer responsibilities for reasonable child/dependant care costs incurred over and above the cost of usual dependant care arrangements, when the employee is required to travel for University business purposes. Reimbursements will be subject to FBT payable by the Budget Centre.

The University also recognises that out of hours care used by employees will often be informal (such as use of babysitters) or may involve indirect costs (such as driving children a distance to stay with relatives or the use of taxis to transport children to after-school activities). Details of such expenditure must, however, be provided to the Head of School/Section for approval, and any payments made by employees need to be properly receipted in support of the claim.

3.9 Reimbursement of Travel Expenditure

The University will pay reasonable travel expenditure in accordance with Cl 33 of the *University of Tasmania Staff Agreement*; and University Travellers must maintain appropriate travel expenditure documentation supporting all purchases of goods and
services in accordance with the provisions of the Travel Procedures, General Purchasing Policy, Invoice Payment Guidelines and General Purchasing Guidelines.

University Travellers are responsible for organising their own visas and passports, noting that the University Travel Agent can assist with visas. Passports are deemed a personal expense and will not be reimbursed by the University, however, any visas required for a particular trip will generally be paid by the University, at the discretion of the individual budget centre.

3.10 No Private Use Declaration and Travel Diaries

All University Travellers undertaking travel for six nights or more are required to substantiate the business purpose of the travel using documentation that complies with Australian Taxation Office (ATO) and Fringe Benefits Tax (FBT) legislative requirements.

Documentation is required to be completed and submitted within 20 days of completion of travel.

Where a traveller neglects to submit documentation or the business purpose of the travel cannot be substantiated, the entire travel will be deemed personal in nature and the traveller will be required to reimburse to the University any travel costs paid by the University.

Where a staff member fails to reimburse the travel costs, FBT will be charged to the budget centre on the total travel cost, and will be included in the respective staff member’s Payment Summary issued at the end of the financial year for inclusion in her/his Income Tax Return.

3.10.1 No Private Use Declaration

A University Traveller who undertakes travel for six nights or more that does not include private travel days or personal travel must complete and submit a No Private Use Declaration.

3.10.2 Travel Diaries

A University Traveller who undertakes travel for six nights or more that includes private travel days or personal travel must complete a Travel Diary.

3.11 Loyalty Programs

3.11.1 Loyalty Points

Loyalty Points such as Frequent Flyer points or Velocity rewards accruing to University Travellers from domestic and international air travel undertaken for business or study purposes will reside with the individual University Traveller.

3.11.2 Airline Lounge Memberships

Memberships for the Senior Management Team are automatically authorised and may be made without further written approval.
Payment of Airline Lounge Membership fees for other staff members may only be authorised (on a year-by-year basis) if a staff member’s employment contract offers such a clause.

In all cases consideration should be given to limiting payments to one per annum.

The University will not authorise payment of Airline Lounge Membership fees from restricted funds.

3.11.3 Hotel or Accommodation Clubs

The University will not authorise payment of membership fees for Hotel Clubs or similar schemes.

3.12 Combined Business and Private Travel

3.12.1 All Travellers

In accordance with the General Purchasing Policy all University travel expenditure must be for University business.

Private travel days that do not exceed 30% of the total travel days will be regarded as incidental to University business, and transport costs will be paid for by the University.

Where private travel days exceed the 30% threshold they will be deemed non-incidental to the business purpose of the travel and University travellers will be required to make a 50% contribution to the relevant transport costs. FBT will be applied where a contribution is required but not received by the University.

University business days are those undertaking formal business activities and will include:

- transit days when travelling to a business destination from home or from a business destination returning home
- a recovery day for long haul international travel (excluding short haul international such as Oceania and Asia)
- weekends and public holidays surrounded by business travel days with formal business activities (excluding those days falling between a transit day and business day that is not a recovery day)
- unavoidable delays between business activities where the number of days are deemed reasonable.

Private travel days include:
- weekends and public holidays not surrounded by business days with formal work activities
- personal days including annual leave, long service leave and time in lieu.

The University’s Travel Contract Owner will determine the nature of the travel and is authorised to make a ruling if necessary.
3.12.2 Insurance and Private Travel

Corporate Travel Insurance coverage is not provided for any private travel days where the incidental private travel threshold is exceeded.

3.13 Accompanying spouse, partner and family member travel

In special circumstances, travel costs for accompanying, spouse, partner or family member may be funded by the University at the discretion of the Chief Operating Officer or Provost where not already included in a staff member’s contract. Such travel costs will be subject to Fringe Benefits Tax payable by the relevant Budget Centre.

3.14 Carbon Offsets

University commitments to environmental sustainability recognise carbon emissions as an issue associated with travel. Vehicle fleet and air travel data are collected through central systems and carbon emissions determined for reporting under the National Greenhouse and Energy Reporting Scheme. The University addresses carbon emissions centrally and Travellers are not required to offset their emissions individually through any booking options.

3.15 Breaches of Travel Policy

Breaches of this Travel Policy include:

- making booking arrangements outside the University’s contracted Travel Agents for travel arrangements specified in this Policy
- failure to secure appropriate authorisation (where required)
- failure to take appropriate risk management steps
- failure to make the appropriate notification (where required)
- failure to complete the requisite Travel Documentation.

Measures for breaches of this Travel Policy will be administered in accordance with staff and student University disciplinary procedures

3.16 Exceptions to this Policy

The Chief Operating Officer or Provost may only approve an exemption from these requirements in very exceptional circumstances.
4 Definitions and Acronyms

ATO
Australian Taxation Office

Authorised travel
Travel that is approved in accordance with this Policy and associated procedures and guidelines, and in accordance with the Delegations Policy and Schedule of Travel Delegations

Best Fare Appropriate
Lowest logical available end to end fare that suits the requirements of the University Traveller to complete the University travel purpose effectively

Carer
As per Tasmanian Carer Policy: A carer is a person who provides, in a non-contractual and unpaid capacity, ongoing care or assistance to another person who, because of a disability, frailty, chronic illness or pain, requires assistance with everyday tasks

Dependant Care
Care of a person who is a spouse or partner or child or other immediate family member of either the employee or the employee’s spouse or partner, who is dependant on the employee for such care (whether or not the employee is that person’s primary care-giver)

DFAT Travel Advisories
Advice provided by the Department of Foreign Affairs and Trade (DFAT) regarding risks associated with international travel, across four levels as follows:
1. Exercise normal safety precautions
2. Exercise a high degree of caution
3. Reconsider your need to travel
4. Do not travel

Incidental Private Travel
Travel that is of a personal nature but within the limits specified

Delegated Authority
An authorised officer according to the Delegations Policy, Schedule of Travel Delegations and Travel Advisory Requirements

Senior Executive
Any member of the Senior Executive of the University

Senior Management Team
Any member of the Senior Management Team of the University

Travel Management System
Travel management software enabling travel authorisations, workflows and bookings of the most cost effective and logical flight and accommodation options of travel for individual registered clients

University Travel Agent
Travel agencies or management companies with whom the University has a preferred or contracted supplier agreement

University Traveller
Includes but is not limited to:
- University staff travelling on University business;
- enrolled University of Tasmania students travelling for study purposes;
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- members of Council and other University committees travelling on University business;
- family members of University Travellers approved and funded by the University;
- other travellers acting under the University’s authority

5 Supporting Documentation

- Travel Procedure
- Travel Portal website
- Tasmanian Carer Policy 2013
- University of Tasmania Staff Agreement 2013-2016
- Business Card Procedure
- Delegations Policy and Schedule of Travel Delegations
- Work Health and Safety Policy
- Minimum Standard - Field Activity
- General Purchasing Policy
- General Purchasing Guidelines
- Hospitality Guidelines
- Insurance Guidelines
- Invoice Payment Guidelines
- Minimum Standard – Safe Driving of Authorised Vehicles

6 Versioning

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<tr>
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<tr>
<td>Current Version</td>
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