

Travel Procedure

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Purpose

This procedure provides clarity on when and how the University of Tasmania will provide for and support our travellers. The procedure also describes how all University business travel is approved, booked, and paid.

Applicable governance instruments

Instrument	Section	Principles
<i>Procurement Policy</i>	1 Value for Money 3 Governance	1.1, 1.2, 1.4, 3.1, 3.2
<i>Health and Safety Policy</i>	1 People, health, and safety	1.1 – 1.6
<i>General Delegation Ordinance</i>	4 Delegation principles, 5 Profiles & 6 Expenditure delegations	4, 5, 6
<i>Sustainability Policy</i>	1 Sustainability	1.1, 1.2, 1.5, 1.8
<i>Covid19 Safety Procedure</i>	2. Vaccination	2.1 – 2.7
<i>Staff Agreement</i>	31 Allowable Expenses	31

Procedure

1. Introduction

The objectives of this procedure are to:

- ensure the safety, wellbeing, support, sustainability, and security of University community members while travelling, and
- provide clarity on how travellers will be provided for and supported when travelling.
- provide a consistent, efficient, and centralised process for the booking and management of all University business travel.

It applies to all business travel undertaken by members of the University community, including:

- University council members, staff, students, and volunteers
- University visitors and contractors when travelling on behalf of the University and the University is directly paying for the travel.

Before planning, booking or commencing any travel, travellers must check the University's latest advice on the [Travel Home Page – All Staff](#) intranet page. The information on this intranet page can be subject to change and will reference the latest safety directives from the People and Wellbeing, Safety Team, which may override components of this procedure.

This procedure can be used as a guide to allowable travel and expenditure for employees considering External Study Program (formally known as Study Leave) or suppliers who are on-charging their travel costs as part of the delivery of goods and services to the University.

The University booking and management of approved University business travel is centralised. All travel paid for by the University is managed through the University's Travel Management Company (TMC, e.g., CTM Travel). Students self-paying for their own travel are encouraged to leverage our contracted TMC service, however this is not mandatory. Travel bookings for students travelling on an arranged University course are to be made through the University's TMC.

The TMC manages travel in these ways:

- Bookings made through TMC's Online Booking Tool (OBT, e.g., CTM Travel's Lightning Tool); or
- Offline Bookings made directly with the TMC's travel consultant;
- Provides additional protection for our travellers through comprehensive traveller location tracking, itinerary reporting, 24-hour travel assistance and travel risk advice, and;
- Manual lodgement of externally booked itineraries (e.g., for external paid travel) into the OBT for traveller tracking.

2. Need for Travel

Prior to any University business travel being booked, travellers and line managers are asked to consider the purpose for the travel and that there is a genuine need for the travel to occur. Alternatives, including video conferencing, which have lower carbon emission benefits should be considered.

3. Traveller Safety and Wellbeing

The University has a duty of care to ensure the safety and wellbeing of travellers undertaking approved travel. Key to this duty is the provision of comprehensive travel insurance which includes ongoing support while travelling and setting additional requirements for higher risk travel.

Travellers also have a duty to minimise risks to their own safety, health and security while travelling, including by ensuring that vaccinations, inoculations, and any other medical requirements are met.

Travellers should review the University's Insurance Intranet guidelines to be aware of the applicable cover and exclusions that may apply to the intended travel.

3.1. Travel Insurance

The University provides Corporate Travel Insurance for authorised travellers on approved travel, where:

- i. the required travel is more than 50kms from the traveller's usual place of residence or usual workplace; and
- ii. for travel up to 180 days.

Travel insurance does not cover daily travel between home and place of business unless it involves travel to and from the traveller's home state.

a) *International high-risk areas*

Travel to Department of Foreign Affairs and Trade (DFAT) Level 3 and Level 4 countries, regions and areas require an approved extension of cover under the University's Corporate Travel Insurance policy.

It is the traveller's responsibility to contact the University's Insurance team (via Staff ServiceNow Portal) to arrange this extension of cover, ensuring they are covered by the University's travel insurance for these sections of their itinerary before finalising the booking.

Confirmation of the extension of cover must be submitted by the traveller with the pre-trip business case and risk assessment to the relevant travel approver (refer Travel Home Page on the Staff Intranet for link to form).

b) *Travel greater than 180 days*

University Travellers travelling for greater than 180 days in a single trip must request a quote from the University's Insurance team at least two weeks prior to travelling.

The Insurance team will obtain a quote from the University Insurer and the additional insurance premium will be charged back to the relevant project.

3.2. Safety Measures Prior to Travelling

Before travelling, travellers must review the Travel – Planning My Trip guidelines on the University's travel intranet page. This includes downloading the University's prescribed apps for Safety (Safe Zone), TMC Travel app and Traveller Insurance Support and also subscribing to Australian Government's SmartTraveller service for alerts and keeping up to date with government travel advice and the travel safety alerts issued by the University.

University travellers must adhere to all travel instructions and be prepared for all foreseeable situations (including changes at short notice) before they leave.

International Travellers must also arrange access to global roaming (voice and data) with their mobile phone provider prior to travelling. This is inexpensive and the additional cost is covered by the University.

3.3. University Travel Safety and Support Service

While travelling, travellers have access to the University's comprehensive travel safety service, which includes a 24-hour support line in circumstances such as political unrest, natural disasters, medical emergencies, and threats to personal safety.

3.4. Higher Risk Travel

a) *International high-risk areas*

The TMC pre-trip approval process must address and inform the traveller of the Government's Department of Foreign Affairs and Trade (DFAT) ratings on Smart Traveller and advice for all flight destinations on the proposed itinerary.

RATING	DESCRIPTION	ADVICE
Level 1	Exercise normal safety precautions	Indicates an overall security environment similar to that in a large Australian city. Overall, threats are not significant.
Level 2	Exercise a high degree of caution	More numerous or significant risks in this location than what you would typically find in a large Australian city.
Level 3	Reconsider your need for travel	Serious and potentially life-threatening threats that make the destination unsafe and unsuitable for most travellers
Level 4	Do not travel	

Travel to countries with a DFAT Level 3 or 4 is to be avoided, other than in business-critical exceptional circumstances. If there are exceptional circumstances:

- An authorisation request to travel to DFAT Level 3 and 4 countries must be submitted in the pre-trip approval (in ServiceNow) before the booking is made and at least three weeks prior to the proposed departure. Any request must be accompanied by a comprehensive risk assessment and risk mitigation plan, along with the business case documenting the need for international travel to these high-risk areas.
- The International Travel ServiceNow request for high-risk countries will be routed for the higher-level risk approval.

b) *Field Trips*

Field trips can carry additional risk to safety. To ensure the safety of travellers, the [Field Activity Hazard Identification Checklist](#) must be followed when undertaking field activities and field work at the University.

4. Approval to Travel

No prior approval is required for staff intrastate (within home state) travel however there is a mutual trust and accountability that the line manager has visibility of travel arrangements (be it either a one off or a regular responsibility of the role) for the safety and wellbeing of the traveller.

All staff interstate (outside home state) must be discussed with line manager before travel plans are confirmed. Prior approval in writing is not required before making a domestic booking, as the line manager will receive an email when booking has been made – this represents as the ‘passive approval’ confirmation. The Line Manager must immediately contact the traveller and the TMC should they wish to decline or vary the travel.

All non-staff (includes students and visitors) travel requests should be discussed and agreed with responsible staff member before any bookings are made on their behalf. For all international travel, an online pre-trip approval (PTA) request must also be submitted and approved before bookings are made with the TMC.

The travel expense for the budget centre (also with consideration to risk) must be approved in line with the *General Delegations Ordinance*.

4.1. Accompanying Dependent

In exceptional circumstances, travel costs for a dependent may be covered by the University at the discretion of the Office of the Provost or Office of the Chief Operating Officer.

If approved, these costs will be subject to Fringe Benefits Tax payable by the budget centre.

4.2. Unauthorised Travel

University travellers undertaking unauthorised / unapproved travel will not be covered by University’s Corporate Travel Insurance and the costs will not be paid for by the University.

The budget centre is responsible for ensuring recovery of paid costs from unauthorised travellers.

5. Booking Travel

5.1. Use of the TMC

All travel paid for by the University (including airfares, major rail and boat fares, accommodation and car hire outside of Tasmania) must be booked through the TMC except where an external funding body requires the travel arrangements to be booked through their preferred travel agent.

Offline Bookings (still be to be booked with the TMC) are used for all international travel, and for complex, group, or unusual intrastate and interstate travel where the assistance of a travel consultant is necessary.

5.2. Changes to Authorised Travel

University Travellers must contact the TMC for any changes to travel arrangements as soon as practical. This includes changes to departure dates and return dates as well as changes to the travel period.

University Travellers are responsible for liaising with the TMC to ensure management of refunds or credits for any fares or expenses where applicable for cancelled bookings.

5.3. Group Travel

If nine people or more are booking the same air travel or accommodation, a group booking can be made. Group travel is booked offline, directly with a TMC’s travel consultant.

5.4. Booking Travel for non-staff (including students and visitors)

Where the travel booking is for non-staff, the travel arranger will be required to set up a one-time guest or new traveller profile in the OBT. The TMC will be able to provide guidance for this task.

6. Accommodation

All accommodation, including within Tasmania, paid for by the University must be booked via the TMC (excluding AirBnB). This ensures that there is a comprehensive record of travel plans for safety and security purposes and access to best rates.

Accommodation should not be booked directly with any hotel nor via aggregator websites or online marketplaces, including Stayz; Bookings.com; Trivago; etc.

When booking accommodation:

- It is the responsibility of the traveller to research and find appropriate accommodation and to ensure the accommodation they are booking meets their business lodging needs.
- The traveller accepts all responsibility for personal risk and safety, and it is expected that travellers have conducted appropriate due diligence before departure and on arrival, to ensure the standard of accommodation meets their needs, is safe, is in a safe neighbourhood and is conducive to conducting university business.
- The TMC will not be liable for a traveller's safety, or the standard of accommodation that is booked.
- The TMC will not provide any recommendations or provide suggestions regarding non-hotel bookings.
- The TMC will simply function as a booking agent ONLY to ensure that University travellers can be located and contacted in the event of an emergency.

6.1. Hotel Accommodation

Hotel accommodation is the preferred lodging option for the University.

Hotel accommodation is booked by the traveller through the TMC's Online Booking Tool or offline with the TMC's travel consultant if the required accommodation is not available through the OBT.

The standard of accommodation chosen must provide a safe and secure environment, be conveniently located and at a reasonable cost.

For accommodation not booked through the TMC's Online Booking Tool, the University uses the ATO Reasonable Travel Allowance Rates (updated annually) and referenced in the [Staff Agreement](#) as a guide for allowable domestic and international accommodation expense.

If the only accommodation available is above the reasonable expenditure level, then approval must be sought from the traveller's line manager before booking the accommodation.

Travellers (more than one) are permitted to book multiple-occupancy accommodation (e.g., two-bedroom serviced apartment) instead of independent rooms where this meets the travellers needs and allows for a lower overall cost to the University.

University staff are encouraged to leverage the University's hotel contracted rates for their own personal travel and can access the corporate rates on offer. All personal travel bookings

must be made by calling direct to the hotel and not through the TMC.

6.2. Non-Hotel Style Bookings (Airbnb, Backpackers, Camping Grounds, etc.)

Airbnb, backpacker's accommodation, campgrounds, cottages and similar can be used where suitable hotel accommodation does not meet the specific needs of the trip. This may include:

- a) Where remote accommodation is required, and no standard hotel offerings are available or meet the required business needs; and
- b) Where the requirement of the trip stipulates the type of lodging to be sought. For example, camping grounds or cabins for field trips.

The TMC will book the non-hotel accommodation (except for Airbnb) on behalf of the traveller.

Non-hotel bookings are made offline via the TMC's travel consultant. It is recommended that the TMC book this manually on behalf of the traveller, so that all travel and accommodation is recorded and monitored, and any assistance, changes and on-trip support can continue to be provided.

Payment will be by invoice or credit card payment to a recognised accommodation provider. No in kind or contra payment arrangements will be permitted (e.g., no gift vouchers as payment).

6.3. Accommodation not being funded by the University (e.g., being paid for by the traveller or external party)

Where accommodation is not being paid for by the University, it is still recommended that bookings be made through the TMC so that there is a traceable record for traveller safety and security, and to enable access to the University's agreed rates.

This includes the following situations:

- Where the traveller is personally funding the accommodation.
- Where a third party is paying for/funding the accommodation and has specified the booking process.
- Third party organised accommodation as part of a conference, event, tour or similar.
- Staff conducting "off-grid" fieldwork staying at purpose-built research stations or similar.

It is mandatory that the traveller obtains confirmation from the University's Insurance team that they are covered under the University insurance policy or has alternate travel insurance in place for non-standard travel.

7. Ground Transport

7.1. Ground Transport Considerations

The following factors must be considered when determining the most appropriate mode of ground transport for University Business Travel:

- necessity to travel;
- safety;
- sustainability;

- lowest total cost;
- period for which a vehicle is required;
- distance of the trip; and
- location e.g., inter-campus, intrastate or interstate.

Travellers should avoid travel with excessive cost or personal inconvenience.

Where appropriate, active, or public transport should be considered as a cost-effective and sustainable ground transport alternative.

7.2. Ground Transport Options

The University has prioritised the modes of transport that can be used for University travel. Where available, number 1 on the Order of Priority should be the preferred option, followed by 2, 3, 4, etc.

Order of Priority:

1. *University Fleet Vehicle (intrastate only):*

A permanently allocated department vehicle where available to the driver.

2. *Car-share vehicle (intrastate or interstate):*

These vehicles, where provided, are available on hourly rate hire basis (e.g., Flexicar or GoGet). This service may be suitable for travel intercity between campuses.

3. *Ride-share (e.g., UniHopper Bus and Uber) and alternatives:*

- a) Where available, travellers are encouraged to use the UniHopper bus service for travel between intercity campuses.
- b) Uber is the preferred means of external Ride-share ground transport.

The University has an Uber for Business Corporate Account. When Uber is used, the trip cost will be automatically charged to the nominated project expense code that the traveller selects when creating the booking.

4. *Rental Vehicle (preference is for zero or lower emission vehicles selections where available):*

- a) Interstate & Overseas - A hire vehicle may be arranged through University's TMC.
- b) Intrastate - A short-term hire vehicle may be booked using the University-wide preferred supplier in PurchaseNow.

5. *Micro-mobility (includes bicycles and scooters)*

Where available, the University is supportive of staff using bicycles or scooters for short commutes between campuses. Many of our buildings provide on-site secure areas for storage.

6. *Taxi*

Taxi can be used as an alternate short distance option to Uber in areas where Uber is not available. A University Credit Card should be used for Taxi fares. In circumstances, where the

employee does not hold a credit card, they may pay the taxi fares personally and claim a reimbursement back from the University upon presentation of a tax invoice.

7. *Private Vehicles*

The University does not provide insurance coverage for private vehicle use. The cost of any accident repairs, damage, and liability (including insurance excesses) for private vehicles are the sole responsibility of the driver.

- a) [A Private Vehicle Approval](#) form must be submitted for approval to the employee's head of organisational unit prior to the use of a private vehicle for any trips.
- b) Discussion regarding any expense reimbursement needs to be held with the line manager before travel.
- c) Any travel over 5,000 kms per year claimed by a staff member using a private vehicle, will not be reimbursed by the University. Staff members may choose to claim reimbursement of kms over 5,000km as a tax deduction in their personal tax return.

8. **Air Travel**

8.1. Frequent flyer/Loyalty programs and Lounge memberships

Travellers can use personal frequent flyer point accruals, bonuses, and lounge memberships, for air travel, however it should in no way influence the fare class or airline booked. In addition:

- a) Participation and joining fees will not be paid for by the University.
- b) Personal frequent flyer points can be accumulated by staff, students and external partners while travelling on University business.

8.2. University Funded Airline Club and Lounge Membership

The authorised delegate (minimum Level C as per the General Delegations Ordinance) may approve for the University to fund Qantas club or Virgin Australia membership for staff if the individual employment contract allows for it.

8.3. Domestic Air Travel

All domestic air travel will be economy class.

The University employs the "*Best Fare of The Day*" principle. Within reason, and considering the most logical fare, University travellers should always choose the most economical flight and fare type. When issued through CTM, all base fares can be changed.

8.4. International Air Travel

All international air travel will be economy class.

The University employs the "*Best Fare of The Day*" principle. Within reason, and considering the most logical fare, University travellers should always choose the most economical flight and fare type. When issued through CTM, all base fares can be changed.

a) *Exception to Economy Class – By Approval*

Premium Economy (or Business Class where the former is unavailable) may be authorised by the University in the following circumstances:

- Where the staff member's individual employment contract specifies the class of travel.
- Where it is warranted on medical grounds with supporting medical certificate.
- Where the flight is not arranged nor funded by the University.

The traveller must obtain approval, via their line manager, from the Office of the Chief Operating Officer and provide this approval to the TMC prior to booking.

b) *Exception to Economy Class – Personal Contribution*

- Travellers may elect to personally pay or use frequent flyer points to upgrade a base economy class ticket to a higher class of air ticket.
- Where an upgrade requires the traveller to purchase a higher ticket than base economy, it is the traveller's responsibility to fund the difference from the base economy fare.

9. Dual Purpose Travel - Combining Business and Personal Days

The University allows personal travel days to be taken while on University business travel.

If personal days are greater than 33% the traveller will need to complete a Travel Diary. The traveller will also have to either pay the return journey (domestic travel) or half the airfare (international travel). The CTM Travel agent will split the account and the traveller will need to fully pay their share direct to CTM before travel commences.

On Personal Travel Days, the University will not be paying for accommodation, meals, or transport. The Traveller is required to arrange their own travel insurance for their personal days, and this must be in place prior to leaving. Annual leave should be entered/approved for all personal days (excluding weekends) before the traveller departs.

Calculating Personal Travel Days:

- Travel departure date and return date are deemed to be business days.
- Weekends on either side of the business component are deemed to be business days.

Examples:

- Conference finishes on a Friday and you elect to return on the Sunday. Saturday and Sunday do not count as personal days.
- Conference finishes on a Wednesday and you elect to return on the Sunday. Thursday, Friday, Saturday is deemed personal days. Sunday (the return date) does not count as a personal day.
- Undertook research for 4 weeks, the weekends in the middle and end do not count as personal days.
- Undertook research for 3 weeks, and then one-week holiday at the end of the third week starting on the Friday night. Saturday through to Saturday the following week are deemed personal days. Sunday (the return date) does not count as a personal day.

There may be days during the trip, without formal business activities, that still constitute business travel days which are defined as:

a) *Event days* including:

- i. Days that the conference, meetings etc. are spanned over (including weekends).
 - ii. Days that are unavoidably included when a series of meetings is scheduled and there are no meetings on a day in between meetings by no fault of the traveller.
 - iii. Minimal unavoidable delays between business activities such as a day between meetings, or 3 or 4 days between two major events where work is undertaken at least 3-4 hours per day.
- b) *Recovery days (a single acclimatisation day upon arrival or return)* for long haul international travel (excludes short haul international such as Oceania and Asia).

10. On-Trip Expenses (Meals and Incidentals)

This section provides clarity for the meals and incidental provisions permitted for University business travellers. This excludes the engagement of Catering e.g., official University events, celebrations and meetings which may be attended jointly by travelling and non-travelling staff.

10.1. University Business Travel - Overnight

Overnight University Business Travel is defined as when a staff member is travelling to a different location to their normal workplace *and staying overnight*.

Meal and incidental expenditure relating to the travelling employee, shall be in accordance with the annual ATO Reasonable Travel Allowance Rates as referenced in the Staff Agreement, unless approved by the traveller's line manager in advance of the expense being incurred.

Where multiple University Business Travellers are dining together and the meal expense is not being charged back to each traveller's hotel room, the most senior employee attending is responsible for the payment.

10.2. University Business Travel - Day Trips

Where the traveller is driving one (1) or more hours at a time on a day trip only, the University will pay for a "driver reviver" coffee/beverage.

Where the day trip exceeds four (4) hours, the University will also pay for a lunch meal for the traveller.

Drivers must comply with all health and safety requirements as stipulated in the University's *Health and Safety Policy*.

10.3 Alcohol

- a) The Traveller is permitted to consume one glass of alcohol (wine or beer) with a dinner meal in line with ATO taxation rulings for reasonable travel allowances. Provisions outside of this will require prior approval by Head of Budget Centre and may be subject to Fringe Benefits Tax.
- b) Catered events hosted as part of University business, which are generally arranged and funded by the University event coordinator, do not fall under this clause and the supply and expenditure for those events should be considered under the Procurement Procedure and instructions.

11. Paying for travel

- 11.1. The University uses the annual ATO Reasonable Travel Allowance Rates as referenced in the Staff Agreement as a guide for accommodation, on-trip meals, and incidentals. Expenditure beyond these limits must be discussed and approved by the traveller's line manager prior to the expense

being incurred. These guide rates do not need to be checked for the contracted hotel accommodation options available through the TMC's Online Booking Tool.

It is imperative that travellers keep records of all travel expenses. Tax invoices and receipts are required to substantiate all University costs and out of pocket claims. These documents will be required to be scanned and uploaded into the University's Expense Management (Credit Card) system or via the app. The coding and approval of all related transactions must to be completed within two (2) weeks of returning from the travel.

Travel expenditure may be made in several ways:

- a) University Credit Card
 - i. It is expected that all staff travelling frequently will be issued with a University Credit Card as the preferred method of payment for all expenses while travelling.
 - ii. For travellers without a University Credit Card, the University will prepay as many components of the trip as possible.
- b) Paid by the traveller and reimbursed
 - i. To be reimbursed for travel expenses, the traveller must provide full substantiation and acquittal of domestic and international business travel expenses through the provision of appropriate receipts and invoices upon completion of the travel.
 - ii. Expenses incurred without substantiation may result in the cost being incurred by the traveller.

11.2. Carbon related travel emission costs

As a certified carbon neutral organisation, travellers should be aware that the University is required to purchase offsets for carbon emissions from land based and air travel. Currently this is a centrally managed process, and the related carbon offset may be charged to the nominated project.

11.3. Airfare and Related Expenses

All airfare bookings, changes, transfers etc. must be booked through the University's TMC and a supplier or centrally held University Credit Card is used for the automatic payment where available. When charged centrally, the funds will be automatically deducted from the project code nominated by the traveller.

11.4. Accommodation Expenses

To secure your Interstate accommodation booking made through the TMC's Online Booking Tool, a supplier or centrally held University Credit Card is used automatically by the TMC. Occasionally the accommodation provider may not accept this card type as a method to secure the booking, so the traveller or travel arranger may need to provide the TMC with a University Credit Card held by the traveller or operational support for the school/department (for chargeback).

The current method for finalising payment of Tasmanian accommodation is credit card payment by the traveller on check-out (card-in-hand). If the traveller does not have a University Credit Card, the TMC can arrange for a charge-back to another University Credit Card held by the operational support for the school/department. This must be organised by the traveller before the trip commences.

11.5. Student Travel Bursaries

Full-time students may request and receive a travel bursary to cover the cost of accommodation and meals while travelling, as determined by funding arrangements or the head of budget centre. In such instances the annual ATO Reasonable Travel Allowance Rates as referenced in the Staff Agreement should be used as a guide to reasonable levels of expenditure.

The bursary payment to the student (requested through the Staff Self Service Portal) does not require acquittal or repayment unless the travel is not undertaken.

12. Passports and Visas

12.1. Passports

It is the responsibility of travellers travelling overseas on University business to ensure they hold a current and authorised passport.

Passport costs will be borne by the traveller.

A trip cannot be ticketed without passport details. The travellers must add their passport details to their profile on the OBT before completing the TMC/University's Pre-Trip Approval and booking the trip with the TMC travel consultant.

12.2. Visas

The University will pay visa expenses for University funded business travel.

The University's TMC can be engaged to organise visas. Travellers should allow up to two weeks to acquire a visa depending on the country and rules.

Versions

Version	Action	Approved by	Business Owner/s	Approval Date
1	Approved	Chief Operating Officer	Chief Executive, University Services	10 June 2022