



Travel & Entertainment Policy and Procedures

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OVERVIEW

The purpose of this policy is to:

- guide and support staff and others to manage travel arrangements and expenses relating to travel and entertainment on behalf of the University;
- clearly define the accountabilities associated with managing travel and entertainment on behalf of the University;
- foster a travel environment that aspires to the highest standards of safety and security for travellers, ensuring the University's duty of care is maintained; and
- travel and entertainment expenditure is only made when essential for business purposes, and complies with the University's objective of obtaining value for money.

SCOPE AND APPLICATION

This policy applies to:

- anyone who undertakes approved University business travel domestically (within Australia) or internationally (includes Trans-Tasman) on behalf of the University or in connection with official University business, regardless of duration or source of funds (including the use of consulting or external funds).
- travel by students where they are travelling at the expense of the University, with the approval of the University, and in connection with University activities.
- to anyone who uses University funds for entertainment related expenses on behalf of the University.

This policy does not apply to:

- intercampus travel (i.e. between the North Terrace, Waite or Roseworthy Campuses).

It is the responsibility of the traveller/entertainer to comply with this policy. It is also the responsibility of faculty, division and school/branch heads to ensure that employees and students within their respective business units comply with this policy.

POLICY PRINCIPLES

1. The University will meet reasonable, relevant expenses incurred by those travelling or entertaining on behalf of the University or in connection with approved University activities.
2. Travel relating to externally funded research grants must be in accordance with the conditions of the funding agreement and relevant external body.
3. All travel must be booked through the University's preferred travel management company – [FCM Travel Solutions](#)
4. All travel is to be economy class; any other class of travel (e.g. premium economy, business, first class) may only be booked with the written approval of an authorised delegate.
5. The University's Corporate Credit Card should be used for all travel & entertainment related expenses and transactions acquitted in accordance with the [Corporate Credit Card Procedures](#).
6. Travel arrangements should be made at the earliest convenience to obtain the best value for money and where times are flexible, the lowest possible fare should be selected. The 'best fare of the day' must be accepted where practical, when booking travel.
7. Staff cannot authorise their own travel or reimbursement of expenses. Staff must not be asked to approve travel or related expenses for an individual to whom they report.
8. Travel approvers must consider the safety and security of the traveller particularly for travel to high risk destinations ensuring that the appropriate approval process is followed (refer to point 2.2).

DEFINITIONS

FCM Travel Solutions	the University's travel management company
Fraedom	the University's expense management system
SAVI	the online booking system hosted by FCM Travel Solutions
Authorised Delegate	those persons with the authority to authorise travel (as per Delegations of Authority Table at the end of this policy)
Best fare of the day	means the lowest fare available, across all airlines, within 2 hours either side of the requested flight time
Fringe Benefits Tax	Fringe Benefits Tax (FBT) is a benefit provided in respect of employment as defined in the Fringe Benefits Tax Assessment Act 1986
High Risk Travel	countries where the smartraveller.gov.au travel advice is "do not travel" or 'reconsider your need to travel'

PROCEDURES

1. Preferred Supplier Arrangements

The University has appointed [FCM Travel Solutions](#) as its travel management company, with responsibility for managing the University's day to day business travel requirements. All travel arrangements must be made through SAVI or directly with FCM Travel Solutions (for complex travel itineraries), enabling the University to maintain knowledge of the whereabouts of University travellers

2. Travel Approval

- **Domestic travel:** pre-trip approval by way of a requisition is not required however travellers must notify and seek approval from their Line Manager for travel plans. Once approved, domestic travel must be booked in accordance with this policy and procedure.
- **International travel:** pre-trip approval is required by way of a travel requisition submitted to an Authorised Delegate, in accordance with points 2.1 and 2.2.

2.1 Pre-trip approval for international travel

Responsibility: Traveller/nominee or travel arranger

- i. Prior to making any travel bookings, visit smartraveller.gov.au to check the travel advice level for the country to be visited (if the advice level is "do not travel" or "reconsider your need to travel" complete the process in point 2.2 before proceeding).

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- ii. Submit a travel requisition for approval through [Fraedom](#) attaching supporting documentation e.g. conference invitation.
 - iii. Travel bookings and any associated costs e.g. conference registration must not be made before approval has been obtained.
 - iv. Any significant increase in costs associated with an approved travel requisition must be amended and resubmitted for approval.

Responsibility: Authorised Delegate

- v. Process the request in a timely manner, ensuring that the travel is for legitimate University business, noting that FBT may be liable for private travel of 50% or over – refer to point 11
- vi. Consider the safety and security of the traveller particularly for travel to high risk destinations ensuring that the additional approval process has been followed, a risk assessment completed and supporting documentation supplied (as per point 2.2).
- vii. If the travel is denied or approval withdrawn due to change in circumstances, reasons must be provided.

For more information on the role of the Travel Approver – refer to the [guide](#).

2.2 Procedures for travel to “high risk” destinations

Travel to destinations where the [smartraveller.gov.au](#) travel advice is do not travel or reconsider your need to travel requires additional approval.

Responsibility: Traveller/nominee or travel arranger

- i. Complete the '[Request for Approval to Travel to a High Risk Destination](#)' form which includes a risk assessment, attaching any supporting documentation to the form.
- ii. Once all approvals have been obtained, attach form and all supporting documentation to the travel requisition and proceed as per point 2.1.ii.

3. Travel Obligations

Responsibility: Traveller

- i. Consult [smartraveller.gov.au](#) for the latest travel advice before booking and prior to travel (if “high risk” refer to point 2.2).
- ii. Staff travelling overseas need to be aware of their compliance obligations in regards to the [Defence Trade Controls Act 2012 \(DTCA\)](#) and [The Autonomous Sanctions Act 2011 \(ASA\)](#) refer to the University’s Office of Research Ethics, Compliance and Integrity website under [Export Controls](#)
- iii. Take a [University Corporate Credit Card](#) and if possible, avoid carrying large amounts of cash.
- iv. Ensure that you have a means of communication with the University and FCM Travel Solutions whilst travelling.
- v. Maintain a [travel diary](#) (if applicable) to determine business or private days (refer to point 11)
- vi. Ensure you are aware of any legal and cultural sensitivities in the destinations you are travelling to or through.
- vii. Be familiar with the General Travel Policy Notices listed at 7-13 below.

4. Flights, accommodation and meals

Responsibility: Traveller/nominee or travel arranger

- i. Book all travel either through SAVI or directly with FCM Travel Solutions (for complex travel itineraries).
- ii. Where practical, book the ‘best fare of the day’ economy class from the options presented at the time of booking regardless of airline preferences and/or accrual of frequent flyer points (see note below).
- iii. For favourable pricing on flights, book well advance or at least three weeks prior to departure.
- iv. Accommodation should be booked through SAVI or directly with FCM Travel Solutions, unless there are sound reasons for not doing so (e.g. accommodation is included in a conference package).
- v. The University does not support the use of Airbnb, however will consider exemptions in exceptional circumstances (e.g. duration of stay). To obtain approval, submit an [exemption form](#) prior to making any arrangements.

- vi. Ensure all accommodation and meal expenses (breakfast, lunch, dinner) are reasonable and in line with ATO guidelines for the lowest salary band according to the destination ([ATO Accommodation and Meal Rates](#)).
- vii. Ensure that any cancellations/amendments are effected through FCM Travel Solutions as soon as possible and no later than 24 hours prior to the scheduled check in date/time to minimise change fees and charges.

Note - should a higher fare be chosen, a validation will be recorded in monthly reporting and sent to the relevant Finance Manager.

5. Transport

Travellers should consider using a rental car when driving is more cost-effective than airline or taxis and/or travelling with other colleagues and/or clients, for more information refer to Travel - [Hire Vehicles](#).

Responsibility: Traveller/nominee or travel arranger

- i. Book all rental cars (domestic and international) through SAVI or directly with FCM Travel Solutions (for complex travel itineraries).
- ii. Standard size (sedan or smaller) cars should be utilised unless a larger vehicle is required for a valid reason and returned to the depot with the fuel tank full (failure to do so results in an additional charge).
- iii. Requirements outside of the standard vehicle hire (e.g. off-roading vehicles) may be booked directly with a reputable supplier.
- iv. Staff and students needing to use their own private motor vehicle may claim an allowance – refer to the [Motor Vehicle Procedures](#)
- v. Any private component associated with using a taxi or Uber must be personally funded by the traveller.
- vi. Travellers should use the University's Corporate Credit Card in the first instance; other alternatives are Cabcharge (if within Australia) or [reimbursement](#) of out of pocket expenses.

6. Travel & Entertainment Expenses

Responsibility: Traveller / Cardholder/nominee / event organiser

- i. Ensure that all expenses (e.g. meals, events, catering, gifts) are for legitimate University-related business reasons.
- ii. Use the University's Corporate Credit Card, where possible, retaining supporting documentation and the names of those participating (staff & non-staff).
- iii. Private travel costs of family/partners (with the exception of allowed expenses incurred under a [Dependant Travel Scheme](#)) are not permitted. Where split charging is not available, the staff member must pay in full with private funds and seek reimbursement of the business related portion e.g. meals.
- iv. Tipping is not expected within Australia, however it is recognised that there are certain situations or locations in which tipping is culturally expected and appropriate.
- v. In the case of gifts, the name of the gift recipient must be recorded.
- vi. Fringe Benefits Tax (FBT) charges will be allocated where appropriate.

For information on entertainment expenses and FBT – refer to [Catering, Events & Entertainment](#).

For examples of appropriate and inappropriate use of the University funds on the corporate credit card, refer to the [FAQ's](#) and Appendix A of the [Corporate Credit Card Procedures](#)

6.1 Reimbursement of out of pocket expenses

Out of pocket expenses will only be reimbursed in accordance to the [Reimbursement Procedure](#).

Process for claiming a reimbursement

- University Corporate credit cardholders – raise an expense reimbursement through Freedom.
- Non-cardholders – submit an online [reimbursement form](#)

Overseas visitors

Approved overseas visitors travelling to the University (by invitation) may be reimbursed if the airfare is cheaper when sourced within the country of origin.

Reimbursement will only be made:

- by electronic funds transfer in the same currency that was used for the purchase (where possible); and
- following submission of a valid invoice/receipt and approved documentation e.g. letter of invitation from the University.

GENERAL TRAVEL POLICY NOTICES

7. Travel Insurance

Insurance is provided to University of Adelaide staff while they are undertaking University approved travel. This includes all persons authorised by the University to travel for and on behalf of the University. Refer to [Legal & Risk - Travel Insurance](#) for further information.

Travel defined as “high risk” requires the approval of Legal & Risk – Insurance Office, as per the [Request for Approval to Travel to a High Risk Destination](#) form.

8. Passports and Visas

FCM Travel Solutions will assist with any matters relating to passports, visas and other customs/immigration requirements connected to the business trip, however the traveller is responsible for their passport status, including the cost of renewals or passport photos. The University will only meet the costs of visas for those travellers who require them for University-related business travel.

9. Medical Expenses / Advice / Vaccinations

Travellers are encouraged to seek medical advice prior to travelling overseas. The cost of vaccinations and other precautions recommended as a result of seeking such advice will be reimbursed by the University. Travellers should seek Medicare cover reimbursement before claiming any out of pocket expenses from the University.

10. Airfare Credits

If University travel needs to be cancelled, FCM Travel Solutions will record the value of the airfare in the traveller’s name, noting that airline terms & conditions (including expiry dates) apply. In line with standard airline practice, if a flight is cancelled within 24 hours of departure, the fare will not be credited by the airline.

11. Travel Diaries and Private Travel

Travel diary requirements

To eliminate any Fringe Benefits Tax (FBT) liability to the University, a [travel diary](#) is required for any travel undertaken by staff of 6 or more consecutive nights.

Private Travel

If any private travel component is 50% or more of the total travel, FBT is payable on 50% of the airfare as the trip is deemed to have dual purpose, business and private. To eliminate the University FBT liability, travellers must:

- Reduce the private days to less than 50% of the total travel; or
- Pay 50% of the airfare upfront to FCM Travel Solutions at the time of booking.

Note: if no payment is made towards the airfare at the time of booking, the traveller will be invoiced for the amount. If no payment is received by the due date, the FBT liability will be charged back to the Faculty/Division.

Leisure Travel

Staff members are eligible to access the University preferred supplier rates when booking leisure travel through FCM Travel Solutions, provided the travel is paid on the traveller’s personal credit card.

12. Frequent Flyers and Airline Lounge Memberships

- Loyalty and frequent flyer programs must not be paid using University funds (including consulting accounts).
- Airline lounge memberships (e.g. Qantas Club or Virgin Lounge) are at the personal cost of any traveller with the exception of frequent travellers (e.g. at least 5 times a year) at the discretion of and with the written approval of an authorised delegate. Discounted rates are available through the University, please contact the [Expense Management Team](#) for details.

13. Safety and Security

- University travellers should take reasonable steps to ensure the safety and wellbeing of themselves and those travelling with them - refer to the [HSW Handbook](#).
- Travellers are advised to subscribe to updates with [smartraveller.gov.au](#) and monitor variations of travel advice prior to departure.
- Where a traveller requires emergency assistance, they should contact the University's insurance provider as detailed on the [Legal & Risk - Travel Insurance webpage](#).
- The University has engaged the services of an advisory and travel tracking system to allow the University's HSW Team to locate travellers in the event of an emergency.
- For changes to travel arrangements and ticketing amendments contact [FCM Travel Solutions](#). For contact details, refer to the [Travel Webpage "24 Hours Support"](#).

AUTHORITIES

Authority Category	Authority	Delegation Holder	Limits
Human Resources	Approval of travel	Head of School or Branch Head	International travel, additional costs associated with seating preferences, and airline lounge memberships
Human Resources	Approval of travel	Chief Operating Officer	International travel, additional costs associated with seating preferences, approval to travel premium economy, business or first class and airline lounge memberships
Human Resources	Approval of travel	Deputy Vice-Chancellor and Vice-President	International travel, additional costs associated with seating preferences, approval to travel premium economy, business or first class and airline lounge memberships
Human Resources	Approval of travel	Executive Dean	International travel, additional costs associated with seating preferences, approval to travel premium economy, business or first class and airline lounge memberships
Human Resources	Approval of travel	Vice-Chancellor and President	International travel, additional costs associated with seating preferences, approval to travel premium economy, business or first class and airline lounge memberships
Human Resources	Authority to action travel approval in the Expense Management System	Director, Office of the Vice-Chancellor	Following approval by the Vice-Chancellor, for International travel to direct reports only
Human Resources	Approval of travel defined as high risk	Deputy Vice-Chancellor and Vice-President (External Engagement)	Following approval of international travel by an authorised delegate in accordance with Procedure 2.1.

RMO File No.	F.2014/8259
Policy Custodian	Chief Operating Officer
Responsible policy officer	Chief Financial Officer
Endorsed by	Vice-Chancellor's Executive on 7 November 2018
Approved by	Policy custodian on 9 November 2019
Related Documents and Policies	Financial Management Policy and Procedures: https://www.adelaide.edu.au/policies/3823/ Fraud and Corruption Control Policy: https://www.adelaide.edu.au/policies/2803/
Related Legislation	Defence Trade Controls Act 2012 (DTCA) The Autonomous Sanctions Act 2011 (ASA)
Superseded Policies	Travel and Entertainment Policy 2017
Effective from	1 April 2020
Review Date	6 November 2021 Authority table updated May 2022
Contact for queries about the policy	Corporate Credit Card and Travel Service, ext. 33330 or email corporate.cards@adelaide.edu.au