

TRAVEL AND 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).
- This policy includes 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.
- This policy also applies to anyone who uses University funds for entertainment related expenses on behalf of the University.
- This procedure 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 - [Campus Travel](#).
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 [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

Campus Travel	the University's travel management company
Fraedom	the University's expense management system
Serko Online	Campus Travel's online booking system
Delegated Authority	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 (FBT)	Fringe Benefits Tax 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 Campus Travel 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 Serko Online or directly with Campus Travel (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, 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).
- ii. Submit a travel requisition for approval through [Fraedom](#).
- 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: Delegated Authority

- 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 30% 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.

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. Traveller obligations

Responsibility: Traveller

- i. Consult smartraveller.gov.au for the latest travel advice before 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 Campus Travel 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 Serko Online or directly with Campus Travel (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 Serko Online or directly with Campus Travel, 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 Campus Travel 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 Faculty Finance and Planning Manager / Divisional Management Accountant.

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 Serko Online or directly with Campus Travel (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. The University encourages the use of taxis however, where legal, Uber may be used as an alternative option. 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. Expenses

6.1. Incidental allowances

Travellers can claim an incidental allowance to cover the cost of low value expenses (e.g. newspaper, water, coffee, light snack, car parking, tram ticket). The allowance is claimed based on the number of nights away in line with ATO guidelines for the lowest salary band ([ATO Accommodation and Meal Rates](#)), up to a maximum of 30 nights. If travelling overseas, the rate will vary depending on the destination.

Responsibility: Traveller

- i. If travelling overseas, obtain approval to claim an incidental allowance by specifying the number of nights away on the travel requisition as per 2.1.ii.
- ii. Corporate Credit Card holders claim the incidental allowance by submitting an expense claim through Freedom. Domestic travellers are required to attach the travel itinerary when submitting an expense claim.
- iii. Non credit cardholders can *either* claim an incidental allowance for the number of nights away [using the appropriate form](#) or seek reimbursement of actual expenditure via the [reimbursement process](#).

- iv. Do not seek [reimbursement](#) for out of pocket expenses intended to be covered by the incidental allowance (e.g. double dipping)
- v. Students / non-staff are not eligible to claim incidental allowances but, with approval, may claim [reimbursement](#) of actual expenditure upon production of valid tax invoices.

6.2. Entertainment expenses (including events & catering)

Responsibility: Cardholder/nominee / event organiser

- i. Ensure that all entertainment expenses (e.g. meals, events, catering, gifts) are for legitimate University-related business reasons.
- ii. 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.
- iii. Use the University's Corporate Credit Card, where possible, retaining supporting documentation and the names of those participating (staff & non-staff).
- iv. In the case of gifts, the name of the gift recipient must be recorded.
- v. Acquit all expenses using Fraedom. Fringe Benefits Tax (FBT) charges will be allocated where appropriate. Refer to [Meal & Entertainment Matrix](#).

Visit the [Events, Catering & Entertainment](#) website for more information.

6.3. Reimbursement of out of pocket expenses

Reimbursement will not be made:

- without a valid tax invoice or approved [Lost or Unobtainable Receipt Declaration](#)
- for items covered by a claimed incidental allowance
- later than three months after the expense was incurred, or
- non-compliant travel (e.g. not booked through Campus Travel).

Process for claiming a reimbursement

- Cardholders – raise an expense reimbursement through Fraedom.
- Non-cardholders – submit a [reimbursement form](#)

Refer to [How do I claim a reimbursement?](#)

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

Campus Travel 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, refer to the [Campus Travel website](#).

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, Campus Travel will record the value of the airfare in the travellers 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

- All international travel and any domestic travel undertaken by staff of five or more consecutive nights must be supported by a valid [travel diary](#) to eliminate any FBT liability to the University. Non staff and students are excluded from this requirement.
- Staff incorporating personal travel deemed to be more than incidental to the journey (30% and over of the total journey) will be required to pay 50% of the airfares. If no payment is made, the FBT amount will be charged back to the faculty/division – refer to [Private Travel & FBT](#) webpage.
- Staff members are eligible to access the University preferred supplier rates when booking leisure travel through Campus Travel, provided the travel is paid on the traveller's personal credit card.

12. Frequent Flyer 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 register their travel 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 Campus Travel. For contact details, refer to the [Travel Webpage "24 Hours Support"](#)

Delegations of Authority Table – Travel Approval

Human Resources	Approval of all travel	Head of School or Branch Head	International travel to direct reports only and airline lounge memberships; excludes travel defined as high risk
Human Resources	Approval of all travel	Corporate Manager	International travel to direct reports only and airline lounge memberships; excludes travel defined as high risk
Human Resources	Approval of all travel including travel defined as high risk.	Chief Operating Officer	International travel to direct reports only, business class travel by a traveller on University business and airline lounge memberships; travel defined as high risk must be approved in accordance with Procedure 2.2.
Human Resources	Approval of all travel including travel defined as high risk.	Deputy Vice-Chancellor and Vice-President (Academic)	International travel to direct reports only, business class travel by a traveller on University business and airline lounge memberships; travel defined as high risk must be approved in accordance with Procedure 2.2.
Human Resources	Approval of all travel including travel defined as high risk.	Provost and Deputy Vice-Chancellor and Vice-President (Research)	International travel to direct reports only, business class travel by a traveller on University business and airline lounge memberships; travel defined as high risk must be approved in accordance with Procedure 2.2.
Human Resources	Approval of all travel including travel defined as high risk.	Executive Dean	International travel to direct reports only, business class travel by a traveller on University business and airline lounge memberships; travel defined as high risk must be approved in accordance with Procedure 2.2.
Human Resources	Approval of all travel including travel defined as high risk.	Vice-Chancellor and President	International travel to direct reports only, business class travel by a traveller on University

			business and airline lounge memberships; travel defined as high risk must be approved in accordance with Procedure 2.2.
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; travel defined as high risk must be approved in accordance with Procedure 2.2.
Human Resources	Approval of all travel defined as high risk, in accordance with Procedure 2.2	Pro Vice-Chancellor (International)	