

Travel Procedure

Section 1 - Summary

(1) This Procedure is designed to support the [Travel Policy](#) approved by ensuring all travel requirements are consistent, centrally administrated and cost effective. The Procedure also ensures that all Victoria University staff are aware of their responsibility and accountability in relation to adherence and administration of travel and accommodation.

Section 2 - Scope

(2) This Procedure applies to all Travellers, which for the purposes of this Procedure are defined as:

- a. All University staff and students.
- b. Anyone who incurs travel and travel-related expenses paid wholly or in the majority by the University and/or;
- c. Anyone undertaking funded travel on behalf of, or at the request of, the University.

(3) Individuals providing services under contract to the University should refer to their contract travel provisions before enacting this Procedure and associated Policy and supporting documents.

Section 3 - Definitions

(4) Nil.

Section 4 - Policy/Regulation

(5) See [Travel Policy](#).

Section 5 - Procedures

Appropriate Workplace Behaviour Policy

(6) The University requires Travellers to observe the University's [Appropriate Workplace Behaviour Policy](#).

Travel Alternatives

(7) Travel alternatives should be considered. Teleconferencing and videoconferencing may be suitable alternatives.

Booking Travel

(8) All domestic and international flights must be booked through the University's contracted travel service provider: Campus Travel via the Travel Management System (Concur Travel).

(9) Staff should where possible book accommodation through the University's contracted travel service provider: Campus Travel via Travel Management System (Concur Travel).

(10) Before booking travel, staff MUST complete their Profile in the Travel Management System. This includes:

- a. All fields with a red asterix (First, Last name and Title); AS PER PASSPORT.
- b. Emergency contact details, mobile number must be included;
- c. Passport details if applicable.

(11) Loyalty Memberships may be added under the "Loyalty" tab (but is not a requirement to complete a booking).

(12) Preferences for meal; hotels; airlines or vehicles may also be completed (but is not a requirement to complete a booking).

(13) Travellers are required to understand their fare conditions for the purposes of ensuring best value is achieved.

Accommodation

(14) The standard of accommodation chosen must provide a safe and secure environment, which is conveniently located and at a reasonable cost. For the purpose of University Accommodation, this is a single room, with private facilities in a 3 - 4 star hotel.

(15) AirBnB should not be used as they represent an unacceptable personal safety risk.

(16) Payment of all accommodation must remain in line with the University's [Purchasing Policy](#) and [Purchasing Procedure](#). Staff will be required to bear the costs of any unsubstantiated claims for accommodation incidentals.

(17) VU Travellers attending conferences where accommodation is part of the conference package can be booked with the event organiser but a full itinerary, including air travel, must be attached and provided to the TMC for reporting and Duty of Care purposes.

(18) Where possible and practicable for conference accommodation, quotes from similar hotels and location should be obtained through the TMC to ensure the most cost efficient room rate has been achieved.

(19) Staying with family or friends is also an option for VU Travellers on University business. This is acceptable by the University, if overall work performance is not affected by any discomfort or inconvenience caused by the home visit.

(20) Where the VU Traveller chooses to stay with family or friends whilst on University business, the address of the accommodation shall be provided to the TMC who will record this in their database for reporting and database for Duty of Care purposes, and must be undertaken "at no cost to VU". VU will not provide reimbursement for any costs associated with family or friend accommodation elected to be undertaken by the VU Traveller.

Booking travel for external/non-staff

(21) If the trip is a one-off trip, staff should email Campus Travel directly at victory@campustravel.com.au and request they arrange travel for the external person/guest. Departments must complete the paper based authority forms.

(22) Some staff do not have access to Concur Travel. The staff classifications that do not have access to Concur Travel are listed in the table below. For these staff, the following processes apply:

- a. a travel arranger will need to be allocated to that staff member;
- b. the travel arranger contacts Travel.Unit@vu.edu.au to request the creation of a profile for the staff member;
- c. the travel arranger submits the travel request in Concur Travel. Should the Traveller wish to discuss their travel arrangements with Campus Travel consultants, they may do so directly once the trip has been submitted in

Concur Travel.

Staff that will need a Concur profile created.	Honorary Professor Emeritus Professor Adjunct Professor Ongoing Staff Casual Staff
Paper based approval forms.	Non-staff (Guest) Student

Submit your travel request:

(23) Within Australia

- a. Travelling within Victoria with an overnight stay: Book hotel via Concur Travel Management system.
- b. Travelling within Australia by air: Book airfare via Concur Travel Management system).
- c. Travelling within Australia, NO hotel required, NO airfare: Travel request is NOT required via Travel Management System. Simply have a conversation with your manager and seek your manager's approval for the trip. Travel recorded within individual areas for duty of care.
- d. The University negotiates substantial discounts with airlines, which are only accessible via a contracted travel service and not with direct Internet bookings.

(24) International

- a. Travelling overseas on University related business: Submit request via Concur Travel Management system.

Travel Approvals

(25) Domestic travel does not require an approval within the Concur Travel Management system. All domestic staff travel is pre-approved. It is the responsibility of the staff member to confirm authorisation. It is expected that staff members will have a conversation with their manager or Research 'Lead' Chief Investigator before booking domestic travel.

(26) When submitting a travel request through the Travel System, staff will be required to tick a check box to confirm they "have discussed this with my manager & received approval".

(27) Each travel manager (Dean or Director) will receive an email, for notification purposes only, once a domestic booking has been made. This email will inform them of the travellers trip segments, costs, etc. and options to cancel the booking with TMC if need be. The manager is responsible for informing the traveller should they decide to cancel the booking directly with the TMC.

(28) Where staff are found to be in breach of this Procedure, appropriate action will be taken.

(29) International travel will require approval by an assigned authoriser (Dean or Director) within the Concur Travel system prior to booking.

(30) Travel approvers for international travel must consider budget constraints, business purpose and duty of care responsibilities when deciding whether staff should travel.

Class of Air Travel

(31) Domestic

- a. All domestic air travel will be economy class.
- b. All domestic air travel must be booked via the Concur Travel Management system.

(32) Overseas

- a. All international air travel must be booked using the Approved Travel Management Consultant. University Travellers must book a class of air travel in accordance with the following:
 - i. Chancellor, Vice-Chancellor: Business Class
 - ii. Dean/Director and above positions: Economy Class for continuous trips of eight (8) hours or less, and Premium Economy Class if flight time exceeds eight (8) hours in duration.
 - iii. All other University Travellers: Economy Class
 - iv. The only exceptions to the class of air travel are:
 - University Travellers who have a particular class of airfare stated in their contract of employment;
 - University Travellers who can provide a medical endorsement to their Travel authorising officer indicating that their normal entitlement is unsatisfactory and they require a higher class of travel;
 - University Travellers who personally fund the difference between a higher class of fare and their normal entitlement;
 - University Travellers who have the approval of the Chief Financial Officer to travel in a higher class of travel.

(33) The University has a number of corporate discount agreements in place with airlines. These airlines are considered preferred carriers therefore in the first instance travel with one of these airlines should be considered over other airlines unless the preferred airlines do not service specific destinations.

(34) Air travel upgrades will not be funded by the University and must be paid for by the Traveller.

(35) International Flight Bookings: The TMC will provide the requisite number of quotes and book all flights based on the Best Logical Fare of The Day (BLFOD).

(36) Domestic Flight Bookings: The TMC will provide the requisite number of quotes and book all flights based on the Best Fare of The Day (BFOD).

(37) If air travel is required/requested outside of the economy class BFOD and BLFOD, or where other than economy class ticketing is required, this will be considered by exception and will require additional approval/s by the Director, Strategic Financial Solutions (Systems and Processing).

(38) Travellers must not restrict their travel to one particular air carrier for personal preference and/or frequent flyer mileage recognition. Selection of a higher cost itinerary or airline to obtain frequent flyer mileage is strictly prohibited and instances of occurrence will be reported to the Chief Financial Officer.

(39) All air travel funded and undertaken for purposes will be economy class and approved per [Appendix 1 - Travel Approval](#).

Safety and Security Travel Pre-Planning

(40) Check DFAT ratings for country intending to travel to.

(41) Ensure emergency numbers are programmed into mobile phone you are taking with you:

- a. The 24 hour Emergency Assistance Service.

- b. 24 hour Australian Consular Emergency help line.
- c. Local Emergency Services number.
- d. Details can be found at <http://dfat.gov.au/Travel/Pages/travel.aspx>.

(42) Have the University Insurance Policy number with you at all times. Details available on [Travel Information intranet page](#).

(43) Download, install and test the Smartraveller app before you go.

(44) Register and subscribe to [Smartraveller](#).

(45) Register your travel plan with [Smartraveller](#).

(46) See [Smartraveller](#) intranet pages for phone numbers; subscribing to updates and registering your trip).

(47) For international travel, the travel system (Concur Travel) will advise the Department of Foreign Affairs & Trade (DFAT) ratings for ALL flight destinations on the proposed itinerary. Regions within a single country may have different travel advisory ratings. Where Travellers are using land based travel to move between countries or cities, they must review DFAT ratings for those destinations.

(48) For travel to destinations with a rating of DFAT Level 3 (Reconsider your need to travel) and activity with significant associated risk, your assigned authoriser must consider the risk when approving the trip. When submitting the trip request a Risk Assessment Checklist must be completed and attached to the supporting documents section. The trip will flow to the relevant approver for approval and then is forwarded to the travel service provider for action.

(49) For travel to destinations with a rating of DFAT Level 4 (Do not travel), if, after discussions with the Traveller's Manager, it is still considered necessary to travel on behalf of the University to a high risk destination, a travel request must be submitted on line in Concur Travel. You must complete a Risk Assessment Checklist and attach it to the supporting documents section. The Concur Travel tool will identify the DFAT Level 4 risk rating and will automatically send a risk approval to the relevant Senior Executive Group member. Travel will not be approved and tickets will not be issued, unless the relevant member of the Senior Executive Group has approved the travel. The trip request will then go to the Traveller's authorizer for approval. The authorizer must consider the risk when approving the trip.

(50) Where an itinerary has been approved, the trip has not yet commenced and the travel advisory rating changes to a higher level (Level 3 or Level 4) for any destination on the itinerary, the Traveller must complete a risk assessment checklist (found in the travel booking tool under the Dashboard Link labelled "Risk Assessment Checklist") and forward it to their relevant risk approver for written approval and seek their approval to commence the trip.

(51) University Travellers who are presenting at conferences or collaborating with other researchers in fields such as engineering, life sciences (e.g. biotechnology, biomedicine, pharmacology) physical sciences (e.g. physics, chemistry) and information and communication technology must be aware that Australian Government legislation bans the transfer of certain types of information to persons or locations outside Australia unless you have first obtained a permit. For more information refer Department of Defence – [Defence Export Controls website](#).

(52) Where travel has already commenced and the DFAT risk rating changes to a higher level (Level 3 or Level 4), the Traveller must immediately contact their relevant risk approver and seek approval to continue the trip.

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	

Triplt Pro - Concur

(53) As part of VU's online travel management Concur portal, VU staff also have free access to Triplt Pro. As well as providing all up to date travel itinerary information related to the VU Traveller's trip, Triplt also provides up to date pre-departure information including Risk, Culture, Transport, and Medical information related to the destination/s to be travelled. The system also allows VU the ability to capture and maintain a detailed record of the VU Traveller itinerary and provides another method of emergency communication for Duty of Care purposes.

(54) All VU Travellers should ensure their travel itinerary is uploaded into Triplt Pro prior to departure.

(55) Registration with Triplt Pro does not negate the requirement for the VU Traveller to register their itinerary with [Smartraveller](#) (DFAT) where required.

Red-24 : Pre-Departure Risk Management

(56) As part of the Travel Insurance Policy VU currently purchase, all VU members get free access to red24 a Risk Management Service. The service provided includes; pre-departure information on Risk, Culture, Transport, and Medical requirements plus others.

(57) This service provides a similar risk information and management service as Concur Trip It Pro. VU Travelers may elect to log into to red24 and track their intended location, as it provides a consolidated and far more diverse series of information than DFAT can provide. Registration with red24 does not negate the requirement for the VU Traveller to register their itinerary with [Smartraveller](#) (DFAT) where required.

(58) VU Travelers must register with red24 by following the below prompts:

- a. Please go to www.red24.com/chubbau
 - i. Go to 'Register'
 - ii. Use your VU policy number: 02PP018244
 - iii. Click 'Proceed'
 - iv. Complete the registration form
 - v. Download the app

General - Overseas Emergency Incidences

(59) Where specific issues arise that require urgent communication to all staff and students of the University (e.g. health epidemic information) the University's Critical Incident Senior Controller will be the coordinator of such advice. Such advice will be based on official advice from DFAT and appropriate health authorities. Please see the Victoria University [Critical Incident and Emergency Management Policy](#).

(60) In the event of an emergency occurring overseas, the Authorized Approver of any staff who are travelling in the affected location must immediately notify the University's Critical Incident Senior Controller who will determine appropriate action, which may include activating the University Crisis Management and Recovery plan if appropriate.

(61) The Traveller will also be contacted by the TMC if alternative travel arrangements need to be organised. It is important that the Traveller has the key contact details updated on their Concur travel profile.

Travel Expenses

(62) University staff who undertake approved overseas travel on behalf of the University may be paid a daily Per Diem based on nights away from home up to the maximum indicated in the Per Diem Rates Table and Calculator. See Clauses 66-74 below.

(63) Cash expenditure should be viewed as exceptional and only incurred where no alternative is available.

(64) If Cash expenditure has been incurred, the University requires full substantiation and acquittal of domestic and international business travel expenses through the provision of appropriate receipts and invoices upon completion of the travel.

(65) To claim or substantiate any travel expenses, use Concur Expense Management System. When you submit your claim through Concur Expense Management System the expense will be approved by your financial authoriser.

(66) Expenses incurred without substantiation may result in the cost of the claim being incurred by the staff member.

Uber Travel

(67) Alternative types of ground transport such as Uber may be used by staff members in Australia and overseas. The staff member must agree to the terms and conditions of the travel provider. University Corporate Cards may be used to pay for Uber transport and must be coded and approved in Concur Expense Management System.

Per Diem

(68) University staff who undertake approved overseas travel on behalf of the University may be paid a daily Per Diem based on nights away from home up to the maximum indicated in the Per Diem Rates Table and Calculator.

(69) The Per Diem Rates Table and Calculator is found on the Travel Information Intranet Page located on the [Travel Information intranet page](#).

(70) Per Diem is not applicable within Australia.

(71) Per Diems will not be paid for any night away where the VU Traveller spends all or a significant part of the 24 hour period on an aircraft. This applies to outward and return journeys. A proportion of the allowable daily rate may be paid in circumstances where a full per diem is not warranted.

(72) Per Diems are paid for short term travel periods, generally for a period not exceeding 21 days. For travel periods greater than 21 days the Per Diem may be deemed to be a Living Away From Home Allowance (LAFHA) and subject to Fringe Benefits Tax (FBT). All LAFHA's are to be paid via the Finance system and require the completion of a LAFHA declaration form to comply with tax law. For further guidance refer to the University [Financial Code of Conduct - Fringe Benefits Tax \(FBT\) Procedures](#) and contact the Tax Compliance Team within Corporate Finance Services for further advice.

(73) Per Diems will be paid to the VU Traveller once the online ATT has completed the approval workflow. The Per Diem amount can be calculated by using the Per Diem Calculator (located on the [Travel Information intranet page](#)). The amount of Per Diem being claimed by the VU Traveller must be included within their online ATT submission and a copy of the Per Diem Calculator must be attached.

(74) Requests for Per Diem payments should be forwarded to Finance for processing and must include the VU Traveller's confirmed/approved Concur travel itinerary together with a copy of the per diem calculator and their

completed Travel Diary.

(75) The VU Traveller is not required to reconcile the actual expenditure incurred whilst on travel and the Per Diem allowance received.

(76) The University will reimburse staff who have made personal payments for other travel expenses in accordance with clause 64.

Concur Expense Management System

(77) Chief Investigators will approve expense transactions coded to externally funded (HERDC) research projects; and

(78) For other expense transactions, Line Managers with financial delegations are to approve expense that relate to their area of responsibility.

Travel diary requirements

(79) Travel diaries are required to be submitted for all travel where absence is for five nights or longer. The travel diary is completed and attached within the Concur Travel system.

(80) Information must be detailed enough to validate the benefit and relevance of the travel to the University.

(81) From the trip request, Travellers will be able to submit their travel diary.

(82) Reporting will be available on submitted and un-submitted travel diaries.

Personal Travel and Accompanied Travel

(83) Where University business and personal travel are combined, all personal travel expenses are entirely for the account of the Traveller.

(84) You will be requested to contribute to the applicable portion of travel costs if you spend more than 50% of the travel time on leave or private activities. Evidence, such as travel diaries, will be considered if there is a dispute.

(85) The University is liable for Fringe Benefits Tax (FBT) on the private portion if the employee contribution is not received.

(86) Queries about FBT implications should be directed to the Taxation Accountant in Finance.

(87) The Traveller will fund all costs for non-employee travel companions.

Business and Private Travel Combined

(88) When travelling on University-related business you can indicate Long Service or Recreation Leave by indicating 'Private Days' in the Travel Activities section, but you may be required to contribute to travel costs.

a. When you need to contribute to costs:

- i. Travel Requests are monitored in the Finance Division and you will be requested to contribute to the applicable portion of travel costs if you spend more than 50% of the travel time on leave or private activities. Evidence, such as travel diaries, will be considered if there is a dispute.
- ii. The University is liable for Fringe Benefits Tax (FBT) on the private portion if the employee contribution is not received.
- iii. Queries about FBT implications should be directed to the Taxation Accountant in Finance.

b. Business v private travel dates – dual purpose trips

- i. Where private travel, such as a period of annual leave or long service leave, is combined with university business travel and the private travel is considered to be more than incidental to the business travel, the expenditure may incur FBT. If this occurs then the employee will be required to make an employee contribution, calculated on a pro rata basis, to the University to reduce the FBT liability to nil.
- ii. When the business and private purposes are equal, 50% of the airfare plus any private accommodation expenses will be required to be repaid to the University.

Definition of terms

(89) Travel days are considered to be business days.

(90) Travel days include days when you are required to travel on a weekend.

(91) Where the travel days are in excess of two, this would indicate a staged multi sector business journey. This would arise where there are two separate business related meetings in different countries.

(92) Any travel or stopovers that are not required as part of the shortest practical route to the business destination, are not counted as travel days.

(93) Acclimatisation days are considered to be business days.

(94) It is important to acclimatise to your new environment to ensure that you perform at your maximum after long haul flights. Therefore, it is understood that you should be well rested prior to commencing active attendance at meetings and conferences.

(95) It is accepted that for international (and long haul) flights that there can be one acclimatisation day upon arrival at the business destination(s) and possibly upon return for each stage of the business related journey.

(96) Acclimatisation days can arise on weekends, but otherwise will only arise where you are not required to take leave by the University.

(97) Event days are considered to be business days.

(98) Event days include the days that the conference, meetings etc. are spanned over (including weekends).

(99) This will include the 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 your own.

(100) For example, if you have a two hour meeting on a Friday and another one hour meeting on a Monday, this would be four event days.

(101) Recreation or Long Service Leave days are considered to be private days.

(102) Leave is granted for private/personal purposes, not in direct connection with travel, meetings or attendance at business related conferences and where the time does not fit in with the criteria for the above business-related terms.

(103) Where the employee takes leave or leave without pay on either side of the weekend, then the weekend should be considered the private days.

Loyalty Programs

Frequent Flyer Schemes

(104) Participation will not be paid by the University.

(105) Staff may choose to personally contribute or use frequent flyer points to upgrade from a University funded fare.

Airline Club Membership

(106) The University will not fund Travel memberships or any other loyalty schemes, unless specifically mentioned in their employment contract.

Passports and Visas

(107) The University will pay Visa expenses for business purposes. Staff travelling overseas on University Business must ensure they hold a current and authorized passport. Passport costs will be borne by the staff member.

(108) Staff must add their passport details to their Concur Travel Profile before booking an international trip. A trip cannot be ticketed without passport details.

Cabcharge

(109) Finance maintains a central facility for the University.

(110) Cabcharge taxi eTICKETS allow for taxi travel to be charged to the individual's cost centre account, avoiding the need for reimbursements to be processed for taxi travel. Each eTICKET has a unique sequence number and can be used for a single trip only.

(111) To apply:

- a. Complete the [Cabcharge Application and Maintenance Form](#).
- b. Have the form signed by an approver with a financial authority of at least \$5,000. (Note: this person must not be the same person that is requesting the facility.)
- c. Send the original document to Accounts Payable, Corporate Finance Services, via internal mail.
- d. Once this has been processed, eTICKETS will be allocated to you. When your allocation of eTICKETS runs low, simply e-mail finance@vu.edu.au and request additional eTICKETS to be sent to you.

Hiring Vehicles

(112) Domestic hire vehicles for VU business requirements must be booked through the VU TMC who will be able to access and book hire vehicles utilising VU's preferred car rental agreements and eligible "Government Rates" wherever possible. There is also a provision for discounted vehicle hire when travelling overseas. For other ground transport requirements such as train travel or bus travel a request should be put forward to the TMC.

(113) Where possible, hiring of environmentally friendly vehicles should be considered.

(114) University staff and students may also be able to access certain agreed arrangements through the VU TMC. All personal travel must be paid for by the individual.

(115) The VU TMC can also assist with train tickets and bus transports if required. These services should be requested at the same time as air fares and accommodation. The TMC have access to train tickets in most countries worldwide.

Status and Details

Status	Current
Effective Date	23rd April 2018
Review Date	23rd April 2021
Approval Authority	Vice-Chancellor
Approval Date	18th April 2018
Expiry Date	Not Applicable
Accountable Officer	Lucy Franzmann Chief Financial Officer
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