

Travel Procedure

Section 1 - Purpose

(1) This Procedure supports the [Travel Policy](#) and provides instructions regarding Travel for Business for Macquarie University and its Controlled Entities (the University).

Scope

(2) This Procedure applies to all Macquarie University professional, academic, and research staff, all staff of controlled entities, students, volunteers, and all authorised contractors across all campuses and locations of the University. This includes anyone who incurs travel and/or travel-related expenses paid for by the University, regardless of the funding source and includes the use of grants, consulting, or external funds.

Section 2 - Policy

(3) Refer to the [Travel Policy](#).

Section 3 - Procedures

Roles and Responsibilities

(4) A summary of key roles and responsibilities is provided in Table 1: High Level Roles and Responsibilities:

Table 1: High Level Roles and Responsibilities	
Traveller / Travel Arranger	a. The Traveller / Travel Arranger: <ol style="list-style-type: none"> i. applies for a Credit Card, Travel Advance, or a Per Diem; ii. complies with the applicable policies and procedures; iii. obtains relevant approvals prior to booking travel; iv. ensures that they: <ul style="list-style-type: none"> possess a valid passport with a minimum 6-month validity beyond the intended return date; have the relevant visas for the destination; have the required vaccinations prior to travel; v. submits relevant leave request (if applicable e.g., Personal Days, long service leave); vi. books travel; viii. completes and retains Travel Diary; ix. pays the Travel Management Company 50% of the total airfare costs when the travel is deemed Dual- Purpose; and x. reconciles and submits travel expenses

Table 1: High Level Roles and Responsibilities

Authorising Officer and/or Manager / Supervisor	<p>b. The Authorising Officer and/or Manager / Supervisor:</p> <ul style="list-style-type: none"> i. ensures that travel is appropriate and necessary; ii. ensures that travel is risk assessed for medical, security, activity, and any other risks; that those risks are controlled as far as reasonably practicable; and that this can be demonstrated by proof of record; iii. seeks confirmation and ensures availability of funding; iv. approves: Credit Card applications; Travel requests; Travel Diaries; Leave requests; and/or Expenses.
Travel Management Company	<p>c. The Travel Management Company:</p> <ul style="list-style-type: none"> i. provides: travel advice and services via Online Booking Tool, Consultants, and the Groups Team; advice on the type of tickets, the inclusions such as luggage, seating, and any restrictions; guidance and assistance with any matters relating to vaccinations, visas, and other customs and immigration requirements; ii. facilitates travel in accordance with the provisions of the Travel Policy and this Procedure; iii. books and provides tickets for the approved travel; iv. provides advice on travel bookings and process improvement; and v. reports to the University on the travel spend as agreed.
Travel Category Manager	<p>d. The Travel Category Manager:</p> <ul style="list-style-type: none"> i. manages the travel category and travel suppliers effectively and appropriately; ii. ensures that value for money is delivered to the University; iii. actively participates in the University Procurement Hub Travel Category; iv. manages exception approvals; and v. serves as an escalation point with the Travel Management Company and travel suppliers.
Purchasing Manager, Finance or nominee	<p>e. The Purchasing Manager, Finance or nominee:</p> <ul style="list-style-type: none"> i. ensures that approval is submitted for Credit Card applications; ii. processes the online Credit Card application; iii. monitors appropriate usage of Credit Cards; and iv. assists with facilitation of exception approvals.

University Contacts

(5) For any questions or concerns related to travel, contact the University's Strategic Procurement Team via travelright@mq.edu.au.

Health, Safety and Security

(6) Travellers may be required to complete a Travel Risk Assessment prior to travel. For further information, refer to the [TravelRight](#) webpage.

Form of Payment

(7) When booking travel via the University's Travel Management Company, the approved travel costs (airfares, Transaction Fees, and some accommodation) will be charged to the central Business Travel Account and then allocated to the Traveller's cost centre.

(8) The University's Credit Card is the preferred method of payment for travel related expenses when travelling and, where possible, should be used for all relevant expenditure.

(9) Travellers who have a University Credit Card:

- a. may only apply for a Travel Advance when travelling to a destination where Credit Cards are not widely accepted; and
- b. may not apply for a Per Diem.

(10) Travellers who do not have a University Credit Card:

- a. may apply for a Credit Card; or
- b. may apply in advance for a Travel Advance or a Per Diem.

(11) A Travel Advance and a Per Diem cannot be claimed for the same period of travel.

(12) Travel Advances must be acquitted against the expenses actually incurred, with unused money repaid to the University.

(13) Where expenses exceed the Travel Advance or Per Diem, and a Traveller has maintained receipts showing expenses, reimbursement of the excess will be made.

(14) Other reimbursement of expenses following travel may only occur when a University Credit Card is not available and a Per Diem allowance or Travel Advance has not been claimed prior to travel.

(15) Travellers are not permitted to use personal credit cards to purchase airline tickets and reimbursement in such cases will not occur.

(16) Refer to the Travel Advance and Per Diem Allowance in [Schedule 2 Forms of Payment and their Applicability](#) for further information.

Group Travel

(17) Travel involving a Group of Travellers and/or students must have a minimum ratio of supervisors to Travellers / students of one (1) to eight(8). Supervisors who are travelling must nominate a back-up supervisor prior to departure and advise the Course Convenor, PhD Supervisor or equivalent within their course or program of the back-up supervisor's details. Any Group not meeting these requirements will be required to seek additional approval from the relevant Executive Dean or a member of the Executive Group.

(18) Groups of Travellers and/or students should include as many First Aiders as practicable. When travelling to Remote or Rural Locations Groups of Travellers and/or students must meet the minimum First Aider requirements as per Table 2: Group Travel – Remote or Rural Location First Aider Requirement.

(19) First Aiders must be trained in remote first aid.

Table 2: Group Travel - Remote or Rural Location First Aider Requirement

Group size	Minimum Requirements
Up to 10	1 Remote or Rural Location First Aider
11 to 20	1 Remote or Rural Location First Aiders + 1 First Aider
21 to 40	2 Remote or Rural Location First Aiders + 1 First Aider for every 10 people over 20

(20) A pre-departure briefing is required for all travel involving a Group of Travellers and/or students. The briefing must be conducted by an Authorising Officer.

(21) No more than two members of the University's Executive Group or two members of an Executive team from a Faculty or Office are to travel in the same aircraft or vehicle at the same time, unless there are exceptional

circumstances that are assessed and approved in writing by the Vice-Chancellor or their nominee.

Approvals

Domestic and Trans-Tasman Travel Approvals

(22) Unless the Authorising Officer or Manager / Supervisor expressly withholds approval, pre-travel approval is not required for Domestic and Trans-Tasman travel, however Travellers must:

- a. notify their Authorising Officer / Manager / Supervisor of their Travel for Business plans;
- b. ensure that the travel expenditure is within the relevant budget; and
- c. ensure that they are medically fit to travel.

International Travel Approvals

(23) All international travel, regardless of the source of funding, must be pre-approved by an Authorising Officer. Where the Traveller's Authorising Officer is not their Manager / Supervisor, the Manager's / Supervisor's endorsement must be obtained.

(24) Travel approval requests must be submitted via the [Online Booking Tool](#), which will retain the approvals for recordkeeping and audit purposes.

(25) If the [Online Booking Tool](#) is not available, travel approvals must be in the form specified in [Appendix 1 Travel Approval Template](#) (email is acceptable) and be retained for record keeping and audit purposes.

Personal Days in Conjunction with Travel for Business: Dual-Purpose Travel

(26) For guidance on how Dual-Purpose Travel arrangements operate refer to [Appendix 2 Dual-Purpose Travel Calculator](#).

Insurance

(27) A University Corporate Travel Insurance policy is in place to provide cover for all Travellers travelling on official University business. For further information refer to the University's [Insurable Risk Policy](#) and [Insurable Risk Guideline](#).

Profiles

Traveller Profiles

(28) Traveller Profiles must be created and maintained for all travellers. Refer to the [TravelRight](#) webpage for instructions.

Booking Travel

(29) Travellers / Travel Arrangers must book travel by using the University's preferred Travel Management Company [Online Booking Tool](#) or the Travel Consultants.

(30) For further details on booking travel (including specific requirements for students) refer to the [TravelRight](#) webpage.

Undertaking Travel

Emergency or Incident Situations

(31) Travellers must ensure that they have the contact details of [International SOS](#), Emergency Services, their

Authorising Officer, Course Convenor, PhD Supervisor, or equivalent and that they have provided a communication plan in case of an emergency or incident. Whenever there is a need for an emergency or incident response, the following steps must be followed:

Domestic Travellers:

- a. Contact Emergency Services (000)
- b. Contact applicable Authorising Officer, Course Convenor, PhD Supervisor, or equivalent within their course or program and report the situation.

International travellers:

- a. Contact [International SOS](#) immediately for assistance (for all medical and security advice, incidents, or emergencies)
- b. Contact the applicable Authorising Officer, Course Convenor, PhD Supervisor, or equivalent within their course or program and report the situation.

Returning from Travel

Reconciling Travel Expenditure

(32) Travellers must reconcile and submit their expenses in accordance with the [Credit Card Policy](#).

(33) Travel Advances must be substantiated with original tax invoices and receipts within one (1) month of the date the expenditure has been incurred. For further information refer to the [Cash or Travel Advance](#) webpage.

Travel Diary

(34) A Travel Diary must be completed for all international travel, for domestic travel of five (5) consecutive nights or more, and for all Dual-Purpose travel of any duration. The Travel Diary must be completed within five (5) days of each period of travel and retained by the Traveller for record keeping and audit purposes.

(35) For further information, refer to [Appendix 3 Travel Diary Template](#).

Insurance

(36) All claims under the University's Corporate Travel Insurance must be submitted within thirty (30) days of the date of the occurrence of the incident in accordance with the [Insurable Risk Policy](#) and [Insurable Risk Guideline](#).

Leisure Travel

(37) The Travel Management Company provides leisure travel services and access to the University Preferred Supplier discounts to University staff. For further information on how to make a leisure booking, refer to the [TravelRight](#) webpage.

Frequent Flyer and Loyalty Programs

(38) Travellers may accumulate and retain frequent flyer and loyalty program points and status credits whilst undertaking Travel for Business, providing the Traveller is personally responsible for any associated membership costs and other tax liabilities.

(39) Supplier selection must not be influenced by the consideration of a frequent flyer or loyalty program if it is detrimental to the University.

Airline Lounge Memberships

(40) Where a Traveller seeks to obtain an airline lounge membership funded by the University, this must be approved by an Authorising Officer. Travellers should forward the approval to travelright@mq.edu.au and request airline lounge membership at the corporate rate where available.

(41) Depending on the University's preferred airline carriers, University staff members may be able to access the corporate airline lounge membership rates for personal use.

Luggage

(42) For Travellers who conduct six (6) or more periods of Travel for Business per year, the University will reimburse the cost of trolleys, suitcases, bags, etc. that are purchased and used for the sole purpose of transporting materials, products, equipment, etc. whilst undertaking Travel for Business to the amount of up to \$400, excl. GST, every two (2) years on presentation of a valid tax invoice and a signed declaration that the luggage is used for Travel for Business purposes.

(43) For further information, refer to [Appendix 4 Luggage Expenses Form](#).

Section 4 - Guidelines

(44) Nil.

Section 5 - Definitions

(45) Definitions specific to this Procedure are contained in the [Travel Policy](#) and below:

- a. Corporate Travel Insurance means the insurances referred to in the [Insurable Risk Policy](#) and [Insurable Risk Guideline](#).
- b. Credit Card means a credit card issued by the University.
- c. First Aider means an individual qualified to give first aid treatment in the event of an injury or illness and provide ongoing care to an ill or injured individual over a prolonged period.
- d. Gratuity or Tips means a sum of money tendered in addition to the cost of the service as recognition for the service provided.
- e. Group of Travellers means three or more Travellers travelling together.
- f. Guest Profile means a profile for an individual authorised to travel on behalf of the University.
- g. Manager / Supervisor means a Traveller's manager/supervisor as determined by Human Resources.
- h. Per Diem means a daily allowance to cover Travel for Business meals and incidentals in accordance with [Schedule 1 Per Diem Allowance and Country Classification](#).
- i. Purchasing Manager, Finance means the University's Purchasing Manager, who is a member of the Finance Shared Services function.
- j. Preferred Supplier means a provider of a service (such as airline, hotel, car hire) that has a formal agreement with the University, its Travel Management Company, or University Procurement Hub (UPH).
- k. Remote or Rural Location means a location more than 100 kilometres from the nearest urban area, or where medical or emergency assistance is more than 60 minutes away, and communication is unreliable.
- l. Travel Advance means any money paid in advance of travel directly to the approved person for travel expenditure that is expected to be incurred when travelling.
- m. Travel Arranger means an individual approved by an Authorising Officer to book travel on behalf of another Traveller.

- n. Travel Diary means a document in the format shown in [Appendix 3 Travel Diary Template](#) that must be prepared by the Traveller and completed within five (5) days after each period of travel.
- o. University Procurement Hub (UPH) means a consortium of Australian Universities joined for the purposes of aggregating procurement activities.

Status and Details

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Responsible Executive	Robin Payne Vice-President, Finance and Resources
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