Travel Procedure

Section 1 - Purpose

(1) This Procedure outlines the required processes for Travel for Business for Macquarie University and its Controlled Entities (the University).

Scope

(2) This Procedure applies to anyone who incurs travel and/or travel-related Incidental Expenses paid for by the University including:

a. officers, staff and Affiliates of the University and its Controlled Entities;
b. students, and
c. volunteers.

(3) The Procedure is applicable regardless of the funding source and includes the use of grants, consulting, and/or external funds.

Section 2 - Policy

(4) Refer to the Travel Policy.

Section 3 - Procedures

Roles and Responsibilities

(5) A summary of key roles and responsibilities is provided below:

Table 1: High Level Roles and Responsibilities	
Traveller/Travel Arranger	a. The Traveller/Travel Arranger: i. applies for a Credit Card or a Travel Advance; ii.may apply for a Travel Bursary if the Traveller is a student; iii. complies with the applicable policies and procedures; iv.obtains relevant approvals prior to booking travel; v.ensures that they: possess a valid passport with a minimum 6-month validity beyond the intended return date; have the relevant visas for the destination; and have the required vaccinations prior to travel; vi. submits relevant leave request (if applicable e.g., Personal Days, long service leave); vii. 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 and/or travel related Incidental Expenses.

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Table 1: High Level Roles and Responsibilities	
Authorising Officer and/or Manager/Supervisor	b. The Authorising Officer and/or Manager/Supervisor: 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; and iii. seeks confirmation and ensures availability of funding; iv. approves: Credit Card applications; Travel requests; Travel Diaries; Leave requests; and/or Travel and/or travel-related Incidental Expenses.
Travel Management Company	c. The Travel Management Company: 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; and 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	d. The Travel Category Manager: 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	e. The Purchasing Manager, Finance or nominee: 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

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

Approvals

Domestic and Trans-Tasman Travel Approvals

(7) Unless the Authorising Officer or Manager/Supervisor expressly withholds approval, pre-travel approval is not required for Domestic and Trans-Tasman travel. 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

(8) 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 in writing

must be obtained.

(9) Travel approvals must be via the Pre-Trip Approval tool or in the form specified in Appendix 1 Travel Approval Template (email is acceptable) and be retained for record keeping and audit purposes.

Booking Travel

(10) Travellers/Travel Arrangers must book travel by the using the University's approved Travel Management Company Online Booking Tool or Travel Consultant.

(11) The Travel Management Company will provide guidance and assistance with matters relating to visas and other customs and immigration requirements relating to the business trip at the time of booking.

(12) Traveller Profiles must be created and maintained for all Travellers. The TravelRight webpage provides instructions and further information including specific requirements for students.

Dual-Purpose Travel

(13) Dual-Purpose Travel must be booked via the Travel Management Company.

(14) To be classified a University Business Day, the dominant purpose of that day needs to be working on University business. This includes attendance at official meetings, conferences, seminars, preparation of presentations and working on general business. Checking emails for one or two hours would not generally constitute a Business Day.

(15) The Traveller must pay 50% of the total cost of the airfares to the Travel Management Company at the time of booking, by providing their personal credit card details either via their Travel Profile, the Online Booking Tool, or directly to the Travel Consultant. If accommodation or car hire is booked, the Traveller must provide their personal credit card details.

(16) For guidance on how Dual-Purpose Travel arrangements operate refer to Appendix 2 Dual-Purpose Travel Calculator.

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).

(18) 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.

(19) 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.

(20) Groups of Travellers and/or students should include as many First Aiders as practicable. First Aiders must be fully trained in remote first aid.

(21) When travelling to Remote or Rural Locations Groups of Travellers and/or students must meet the minimum First Aider requirements as per the table below.

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

Table 2: Group Travel – Remote or Rural Location First Aider Requirement	
21 to 40	2 Remote or Rural Location First Aiders + 1 First Aider for every 10 people over 20

(22) 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.

(23) 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.

Payment for Travel

(24) 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.

(25) The University's Credit Card is the preferred method of payment for accommodation costs and travel-related Incidental Expenses when travelling and, where possible, should be used for all relevant expenditure.

(26) Travellers who have a University Credit Card may only apply for a Travel Advance when travelling to a destination where credit cards are not widely accepted.

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

a. apply for a Credit Card;
b. apply in advance for a Travel Advance; or
c. apply for a Travel Bursary only if the Traveller is a student.

(28) Travel Advances must be acquitted against the travel-related Incidental Expenses actually incurred, with unused money repaid to the University.

(29) Where the travel-related Incidental Expenses exceed the Travel Advance, and a Traveller has maintained receipts showing the travel-related Incidental Expenses, reimbursement of the excess will be made following approval from the Authorising Officer.

(30) Other reimbursement of travel-related Incidental Expenses following travel may only occur when a University Credit Card is not available, and a Travel Bursary allowance or Travel Advance has not been claimed prior to travel.

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

(32) For further information refer to Schedule 2 Forms of Payment and their Applicability.

Undertaking Travel – Emergency or Incident Situations

(33) 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:

a. Domestic Travellers must:
    i. contact Emergency Services (000); and

ii. contact applicable Authorising Officer, Course Convenor, PhD Supervisor, or equivalent within their course or program and report the situation.

b. International Travellers must:

i. contact International SOS immediately for assistance (for all medical and security advice, incidents, or emergencies); and

ii. 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

(34) Travellers must reconcile and submit their travel-related Incidental Expenses in accordance with the Credit Card Policy.

(35) 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 Accounts Payable Cash or Travel Advance.

Travel Diary

(36) 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.

(37) For further information refer to Appendix 3 Travel Diary Template.

Insurance

(38) A University Corporate Travel Insurance policy is in place to provide cover for all Travellers travelling on official University business.

(39) 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

(40) 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

(41) 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.

(42) 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

(43) 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.

(44) 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

(45) For Travellers who conduct six (6) or more periods of Travel for Business per year, the University will reimburse the cost of trolleys, suitcases and bags etc. that are purchased and used for the sole purpose of transporting materials, products and equipment, etc. whilst undertaking Travel for Business to the amount of up to $400 (excluding. 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.

(46) For further information, refer to Appendix 4 Luggage Expenses Form.

Section 4 - Guidelines

(47) Nil.

Section 5 - Definitions

(48) The following definitions apply for the purpose of this Procedure:

a. Authorising Officer means the Delegate who is permitted to approve travel in accordance with the Delegations of Authority Register, Delegations of Authority for Controlled Entities, and the provisions of this Policy.
b. Business Day means:
    i. a day on which University business is conducted;
    ii. a day on which an employee travels to/from the employee's usual place of business (usually Sydney) for University business purposes;
    iii. a day on which an employee travels to a location for official University purposes;
    iv. a weekend during the trip, where the preceding Friday and the following Monday are Business Days;
    v. a public holiday during the trip, where the preceding day and the following day are Business Days; and
    vi. a "recovery day", which is the day following the day where an employee has completed a flight of nine (9) or more hours, provided the day after the recovery day is used for official University business.
c. Business Travel Account (BTA) means a centralised billing account for travel expenses including airfares and Transaction Fees.
d. Corporate Travel Insurance means the insurances referred to in the Insurable Risk Policy and Insurable Risk Guideline.
e. Credit Card means a credit card issued by the University.
f. Domestic Travel means travel within Australian borders.
g. Dual-Purpose Travel means a trip comprising Travel for Business and travel for leisure, where the leisure component is equal to or longer than the Travel for Business component or where a destination is not directly attributable to the Travel for Business purpose.
h. 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.
i. Group of Travellers means three or more Travellers travelling together.
j. Incidental Expenses means travel-related expenses that are minor but necessary expenses associated with work-related travel – for example, a car parking fee, public transport, work-related phone or internet charges or laundry expenses when travel exceeds five (5) consecutive days.

k. International Travel means travel to any destination outside Australian borders.
l. Manager/Supervisor means a Traveller's manager/supervisor as determined by Human Resources.
m. Online Booking Tool means the tool/systems which Travellers use for airline, accommodation, and car bookings. The tool can be accessed via Online Booking Tool.
n. Personal Days means a day that is not a Business Day including a day on which no University business is conducted, a day/s of booked leave, weekends, or public holidays.
o. Purchasing Manager means the University's Purchasing Manager, who is a member of the Finance Shared Services function.
p. 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).
q. 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.
r. 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.
s. Travel Arranger means an individual approved by an Authorising Officer to book travel on behalf of another Traveller.
t. Travel Bursary means a reasonable daily allowance payable to student travellers to cover Travel for Business meals and Incidental Expenses in accordance with Schedule 1 Travel Bursary Allowance and Country Classification.
u. Travel Category Manager means the University's Strategic Sourcing Portfolio Manager, Travel and Corporate Services, who is a member of the Strategic Procurement function.
v. Travel Consultant means a consultant at a Travel Management Company, who facilitates travel reservations for Travellers.
w. 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.
x. Travel for Business means travel approved by an Authorising Officer as part of University business, which may include associated costs for airfares, accommodation, car hire, or other authorised travel costs.
y. Travel Management Company means the supplier/s contracted to provide services associated with booking travel on behalf of the University.
z. Traveller means anyone who undertakes travel on behalf of the University and/or incurs travel or travel-related Incidental Expenses.
aa. 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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