

Travel Policy



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Approver Vice-Chancellor

Steward Senior Deputy Vice-Chancellor
Administrator(s) Manager, Global Learning and Sponsored Students
Head of Financial Compliance
Director Health, Safety and Wellbeing

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1 Purpose

(A). The purpose of this **Policy** is to —
(1). express the practices required when booking, approving and conducting **Travel**.

(B). In this Policy —

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(C). This Policy is to be read in conjunction with the following —

- (1). Travel Guideline;
- (2). Travel Approval Matrix;
- (3). Travel Destination Risk Assessment; and
- (4). Travel Fieldwork Risk Assessment.

2 Scope

2.1 Institutional Scope

(A). The scope of this Policy applies to the entire **University**.

2.2 Individual Scope

(A). The scope of this Policy applies to —

- (1). **Employees**;
- (2). **Students**; and
- (3). Honorary, Adjunct, or Emeritus Appointment.

The University will consider Students who are also employed by the University and conduct Travel in relation to their employment to be Employees under this Policy.

3 Travel

- (A). Travel means movement to conduct **University Activity** —
 - (1). regardless of funding; and
 - (2). includes **Course-related Travel**.

3.1 Private Travel

- (A). **Private Travel** means movement that is not related to University Activity.
- (B). Private Travel may be booked immediately before, immediately after or in between periods of Travel.
- (C). Employees intending to undertake Private Travel that is combined with Travel must apply for the appropriate leave entitlement.
- (D). The University will not accept any financial or legal liability relating to Private Travel.

3.2 Incidental Travel

- (A). **Incidental Travel** means Private Travel that is minor or occasional and does not alter the dominant business purpose of the Travel.
- (B). The method for determining whether Private Travel is Incidental is set out in the Travel Guideline.

3.3 Dual-Purpose Travel

- (A). Except for Students, Travel will be classified as **Dual-Purpose Travel** where the Private Travel component is more than Incidental Travel. This includes instances where the itinerary involves travel directly to or returning from a destination solely for Private Travel Purposes.
- (B). Where the Private Travel destination is reasonably proximate to the business destination, the approver may determine on a case-by-case basis that the Private Travel does not change the predominant business purpose of the Travel.
- (C). Dual-Purpose Travel must be managed in accordance with the Travel Guideline to ensure that the University does not incur a fringe benefits tax (FBT) liability. This includes requirements for substantiation and, where required, Employee contribution.

3.4 Course-related Travel

- (A). Course-related Travel means Travel conducted for the purpose —

- (1). of gaining credit towards a Course; or
- (2). participating in activities endorsed or organised by the University.

and may include but is not limited to —

- (3). **Fieldwork;**
- (4). **Placements**, Internships, and Volunteering;
- (5). **Work Experience;**
- (6). Student **Exchange Program;**
- (7). Study abroad;
- (8). Study tours, **Conferences** and/or **Research**, or External provider programs.

3.5 Accompanying Non-University Travellers

- (A). The University will not reimburse expenses of an accompanying non-University traveller (e.g., spouses, partners, or dependants who are not Employees) unless there is a legitimate business, compassionate, or medical purpose, and an Executive member has approved it in advance of Travel commencing.
- (B). Employees who are the recipient of the Fay Gale Fellowship will be required to pay for any accompanying non-University traveller from personal funds and seek reimbursement up to the agreed amount, and in accordance with Expenditure Financial Control Document and Delegations of Financial Authority.
- (C). Employees who are a recipient of sabbatical grants may be entitled to an additional allowance for any accompanying non-University traveller up to an agreed amount, and in accordance with the Academic Sabbatical Policy, Expenditure Financial Control Document and Delegations of Financial Authority.
- (D). The University will not provide Travel insurance coverage for accompanying non-University travellers, except for spouses, de facto partners and/or dependent children.

Note —

Fringe benefits tax may apply to payments made by the University for accompanying spouses, partners, or dependants. Please contact tax-finserv@uwa.edu.au for further information.

4 Travel Risk

- (A). Individuals must keep themselves up-to-date on current and potential **Risks** associated with their Travel and implement appropriate Risk mitigation measures.
- (B). Individuals conducting Travel must undertake a Travel Destination Risk Assessment when —
 - (1). the destination is rated by the Department of Foreign Affairs and Trade as either “Reconsider Your Need to Travel” or “Do Not Travel”; and/or
 - (2). UWA has issued a Travel Alert that is rated as a Major or Extreme Risk.

- (C). The Senior Deputy Vice-Chancellor may, at any time —
 - (1). issue a UWA Travel Alert; and/or
 - (2). change an existing UWA Travel Alert.
- (D). Individuals conducting Fieldwork must have an approved Field Work Plan inclusive of —
 - (1). Fieldwork Risk Assessment; and
 - (2). have a current Fieldwork Participation Declaration.
- (E). Individuals taking part in activities on behalf of, or on property belonging to, or as part of a project or program of another organisation must follow that organisation's Risk management practices.
- (F). If any part of an individual's travel (including accommodation) is not booked through the University Travel Management System, then they must register their Travel with the University's Travel Emergency Services Provider.

4.1 Travel Bans

- (A). The Senior Deputy Vice-Chancellor may, at any time, implement a ban on Travel on all or specific destinations.

5 Travel Booking

- (A). Travel must be booked through the University Travel Management System except when —
 - (1). booking Travel in an emergency situation;
 - (2). it is not possible to book individual components of Travel using the University Travel Management System; or Travel is self-funded.
- (B). Noting that travel booked outside of the University Travel Management System must be uploaded to the Travel Emergency Services Provider.
- (C). Individuals must book Travel and accommodation at the lowest logical fare or rate, taking into account —
 - (1). health;
 - (2). safety; and
 - (3). practicality of schedules.
- (D). Travel decisions must not be influenced by membership of a frequent traveller program. If a more expensive option is selected due to a connection with a specific airline for which a personal benefit is received, the difference between this fare and the lowest logical fare must be paid for by the individual concerned.

5.1 Class of Travel

- (A). All Travel must be booked in economy class unless any of the following criteria are met —
 - (1). a contract of employment allows for Travel in a class other than economy class;

- (2). a medical certificate supports a need to Travel in a class other than economy class;
 - (3). the nature and timing of the journey required Travel in a class other than economy class; or
 - (4). the impact of economy class Travel decreases the productivity or ability to conduct in-flight business.
- (B). Only the relevant member of the Executive may approve —
- (1). domestic or international premium economy class; or
 - (2). domestic or international business class.
- (C). First class Travel must not be booked.

5.2 Travel Accommodation

- (A). Individuals must book accommodation using the University Travel Service Provider unless —
- (1). it is not possible to do so; or
 - (2). their Travel is self-funded.
- (B). The use of short-term rental accommodation, such as Airbnb, is permitted when it offers demonstrable value for money, or it is the most suitable option for the itinerary. When booking such accommodation individuals must ensure that:
- (1). the property complies with local safety regulations;
 - (2). the property has functioning smoke alarms and carbon monoxide detectors installed;
 - (3). the accommodation details are uploaded into the University Travel Emergency Service Provider prior to Travel.

5.3 Car Rentals

- (A). Individuals must book rental cars (including standard related insurances but excluding any excess waivers as this is included in our corporate travel insurance) using the University Travel Service Provider unless —
- (1). it is not possible to do so; or
 - (2). their Travel is self-funded.

5.4 Travel Plans

- (A). Individuals must load their Travel plans and contact details into the University Travel Management System to enable access to travel emergency services from the University and its Travel Emergency Services Provider as part of the process to seek approval to Travel.

5.5 Travel Communications Plans

- (A). Individuals must load their Travel communications plans into the University Travel Management System as part of the process to seek approval to Travel.

6 Guest Travellers

- (A). The University may book, insure and fund Travel for **Business Visitors** to enable them to conduct University Activity in accordance with the Travel Guideline.

7 Travel Approval

- (A). Travel may only be approved if —
 - (1). there are no alternative viable options available to enable an individual to conduct their University Activity;
 - (2). it makes efficient use of time; and
 - (3). is cost-effective and prudent, regardless of the source of **University Funds**, including Research funds.
- (B). Travel must be approved in accordance with the Travel Approval Matrix.
- (C). Individuals responsible for approving Travel must do so in accordance with the Travel Guideline, Travel Approval Matrix and Delegations of Financial Authority.
- (D). Individuals who have doubts or concerns about information provided as part of Travel booking must not approve that Travel.
- (E). The Senior Deputy Vice-Chancellor may, at any time, change the UWA Travel Approval Matrix. Refer to the UWA Travel Approval Matrix.

8 Travel Expenditure

- (A). Employees may be reimbursed for their Travel **Expenditure** in accordance with the Expenditure Financial Control Document.
- (B). Individuals must calculate the value of their Travel Expenditure before departure and have this value agreed to by their **Supervisor / Manager** before seeking Travel approval.

9 Travel Insurance

- (A). The University will provide Travel insurance for the duration of the period of Travel including weekends and public holidays that fall within that period of Travel.
- (B). The University will not provide insurance cover for Private Travel except for set dates as per Insurance Summary of Cover.

- (C). Individuals must check the conditions and exclusions of Travel insurance in accordance with the Travel Guideline.
- (D). Individuals may not be covered by the University's insurance if their Travel has not been approved.

9.1 Illness and Injury while Travelling

- (A). Individuals who become ill while conducting Travel must contact our Travel Emergency Service Provider in the first instance so they can support them and their Manager / Supervisor and inform them of their situation as soon as practically possible.
- (B). Individuals who injure themselves while conducting Travel must log into the UWA Incident Portal and report their injury.
- (C). Managers / Supervisors must work with the Injury Management and Wellness Team to support individuals who have become ill or injured themselves while conducting Travel.

10 Fringe Benefits Tax (FBT) Liability Arising from Travel (Employees Only)

- (A). FBT is a University liability.
- (B). Employees must ensure that any Private Travel is managed (including by making any required personal contribution) so that it does not result in an FBT liability for the University.
- (C). The detailed method for preventing an FBT liability (including the method for classifying Private Travel and the payment mechanics) is set out in the Travel Guideline.
- (D). Where Travel is Dual-Purpose under section 3.1, the Employee must make a personal contribution equal to 50% of the cost of the Return Airfare to the business destination, on the terms and timing set out in the Travel Guideline.
- (E). The University will not approve instalment plans or deferred repayment arrangements for any Employee contributions required to prevent an FBT liability in relation to Travel.

11 Travel Diary (Employees Only)

- (A). Employees must complete a Travel Diary for all overnight Travel.
- (B). Upon return from Travel, the Travel Diary must be finalised in the University Travel Management System within 14 days of completion of Travel.
- (C). The Travel Diary must cover the entire Travel period, including any Private Travel.
- (D). The form, timing, and evidentiary requirements for Travel Diaries are set out in the Travel Guideline.

- (E). For the purposes of completing a Travel Diary, the terms Business Day and Private Day have the meanings given in the Travel Guideline.

12 University Travel Management System Training

- (A). Finance will provide training on how to use the University Travel Management System.

Definitions

Business Visitor is defined in the Policy Framework Policy.

Conference is defined in the Policy Framework Policy.

Course-related Travel is defined in section 3.4.

Dual-Purpose Travel is defined in section 3.3.

Employee is defined in the Policy Framework Policy.

Exchange Program is defined in the International Student Mobility (Outbound) Policy.

Expenditure is defined in the Finance Policy.

Fieldwork is defined in the Policy Framework Policy.

Incidental Travel is defined in section 3.2.

Manager is defined in the Policy Framework Policy.

Placement is defined in the Courses – Experiential Learning Policy.

Policy is defined in the Policy Framework Policy.

Private Travel is defined in section 3.1.

Research is defined in the Research Integrity Policy.

Risk is defined in the Risk Policy.

Student is defined in the Policy Framework Policy.

Supervisor is defined in the Policy Framework Policy.

Travel is defined in section 3

University Activity is defined in the Policy Framework Policy.

University Funds is defined in the Finance Policy.

University is defined in the Policy Framework Policy.

Work Experience is defined in the Admission – Coursework Policy.

End