

Travel Manual

Section 1 - Introduction

(1) This Travel Manual is to be read in conjunction with the [Travel Policy](#) and forms part of the [Travel Policy](#).

Section 2 - Audience

(2) This Travel Manual applies to all staff and University travellers.

Section 3 - Manual

Part A - Safe

High Risk Country

(3) High risk country means any country or region where the threat to the health and safety of the University traveller is considered high, based on “reconsider” or “advise not to” travel ratings from the Department of Foreign Affairs and Trade (DFAT) and/or “high” or “extreme” risk ratings from International SOS.

(4) The University will not require University travellers to travel to a high risk country on University business. Any travel undertaken to a high risk country, will not be covered by the University's travel insurance, unless appropriate approval has been granted.

Part B - Essential

Travel Diary

(5) Any trip on University business that is 6 nights or longer needs to:

- a. be pre-approved and booked with the University's approved Travel Management Company;
- b. be recorded in the University's Travel Management System and;
- c. have a Travel Diary that is attached to the booking request in the Travel Management System.

(6) The University traveller must submit a signed Travel Diary for:

- a. pre-approval - by their Delegated Officer before the travel is booked, together with any conference itinerary, external invitation or supporting brochure;
- b. post-approval - by their Delegated Officer within 10 business days of returning from the trip, if the pre-approved Travel Diary has changed during the trip.

Leave

(7) The University traveller must ensure some sort of leave as appropriate (annual, long service or leave without pay)

has been booked to cover any weekdays that are classified as private days.

Alternatives to Travel

(8) University travellers must only travel when they can clearly justify, to the satisfaction of the approving Delegated Officer, why alternatives such as teleconferencing and videoconferencing are not a viable option.

Expense Reimbursements

(9) All claims for reimbursement of expenses must be supported by receipts. All transactions incurred on a University corporate credit or travel card must be supported by receipts. Where an expense is incurred in Australia and is greater than \$82.50, inclusive of GST, the receipt must meet the requirements of a tax invoice.

Part C - Economical

Book with Travel Management Company

(10) All domestic travel that is 6 nights or longer and all international travel must be booked through the University's approved Travel Management Company and recorded in the University's Travel Management System.

Economy Class and Upgrades

(11) University travellers must only travel Economy Class, regardless of the source of funds. Any upgrade to Business Class, Premium Economy Class or any other upgrade on Economy Class travel can only be made on the written approval of an SEG member, unless the upgrade is paid using the University traveller's personal funds.

Business Class

(12) Members of the Executive Committee can only travel Business Class on individual flight legs that are longer than 5 hours in duration. Business Class travel for any other University travellers can only be booked on the written approval of an SEG member and should be only for flight legs that are longer than 5 hours in duration. Council members need to refer to the [Reimbursement of Council Members Expenses Policy](#) for the relevant travel and expense requirements.

Airline, Hotel and Frequent Flyer Memberships

(13) The University will not fund any airline lounge club, hotel or frequent flyer memberships for University travellers. University travellers must not use private memberships or personal preference to override the economical [Travel Policy](#) principle when selecting airlines, hotels or any other reward bearing expenses.

Departure Port

(14) If any private travel is undertaken during a trip, the University traveller must return back to the last arrival point that they arrived at while on University business.

Flight Route

(15) When travelling on University business, University travellers must:

- a. undertake the most direct and economical route from the University to the location of their University business and
- b. return back via the same most direct and economical route.

(16) When travelling on University business, University travellers must not direct the choice of a flight route based on:

- a. a personal preference of the route, or
- b. a personal preference of an airline provider, or
- c. private travel needs.

Stopovers

(17) If the most direct and economical route stops at another city before reaching its final University business destination, the University traveller may stopover at this city, as long as there is no extra cost to the University to do so and as long as this travel is treated as private travel with appropriate leave taken by the traveller.

Personal Contribution to Flights' Cost

(18) The University traveller (including student) must personally pay for the private portion of the total flights' cost for a trip whenever the private component of the travel is proposed to be 50% or more of the duration of the entire trip. In this latter scenario, the University traveller must do one of the following:

- a. reduce the private component to be less than 50% of the duration of the entire trip, or
- b. pay the University's Travel Management Company for the entire trip personally themselves and then seek reimbursement of the business component from the University, or
- c. pay the private component of the flights' cost directly to the University's approved Travel Management Company at the time of booking or if a trip change happens post departure, repay the private portion of the flights' cost to the University after completing the trip.

Transport

(19) University travellers must use public transport for University business whenever feasible.

Taxis

(20) Prudent business judgement is to be applied when using taxis. i.e Taxis must not be asked to wait and accrue costs while the University traveller attends a meeting, so they can return back to the same taxi for the next leg of the journey.

Train

(21) Travel by train should be used when available and convenient.

Private Vehicles

(22) It is the responsibility of the University traveller to ensure the private vehicle has comprehensive car insurance and is roadworthy. A University traveller can only use a private vehicle for their travel, if:

- a. this method is pre-approved by their delegated officer for each travel event, and
- b. the associated parking costs and the current [Australian Tax Office's](#) cents per kilometre rate would result in a more economical outcome than the use of any other available public transportation method. Please refer to [Vehicles - Private Vehicle Use Procedure](#).

Car Hire

(23) Car hire should only be used if it is more economical than the use of taxis, trains and private vehicles. Appropriate comprehensive car insurance must only be obtained for the duration of the car hire.

Accommodation

(24) Accommodation must be modest, undertaken in commercial establishments like hotels, motels and serviced apartments and provide a safe and secure environment, conveniently located and providing value for money.

Domestic Travel

(25) For travel within Australia, the daily accommodation charge must not exceed the local accommodation guide provided for the mid-tier annual salary range within the current [Australian Tax Office Taxation Determination](#) for "Reasonable Travel and Overtime Meal Allowance Expense Amounts". Valid tax invoices must be submitted for reimbursement.

International Travel

(26) For international travel, the accommodation rate must be modest, economical, safe and undertaken in commercial establishments like hotels, motels and serviced apartments. Valid tax invoices must be submitted for reimbursement.

Peer-to-peer Accommodation

(27) Providers and Bed and Breakfasts: The University does not condone the use of private or peer-to-peer providers such as AirBnB, Stayz or Bed and Breakfasts, during the business portion of University funded travel. Some of the reasons for this decision are as follows:

- a. Smoke alarms: Many peer-to-peer accommodation providers do not guarantee that smoke alarms are professionally installed and maintained.
- b. Public liability: Many peer-to-peer accommodation providers do not guarantee that the apartment / house has public liability insurance or just domestic home and contents – which is not suitable for a commercial activity. The University understands that AirBnB provides a \$1m Host Guarantee – but that does not cover any damage to the traveller / traveller's property.
- c. Acceptable security, cleanliness and Health & Safety : Many peer-to-peer accommodation providers do not guarantee that the level of security, cleanliness and Health & Safety are professionally conducted.
- d. Police checks: For properties that offer co-habitation with the owners, many peer-to-peer accommodation providers do not guarantee that the residents have all passed police checks and do not pose a risk for the University's travellers.
- e. Animal containment: If there are animals in the accommodation, many peer-to-peer accommodation providers do not guarantee that those are appropriately contained and have been contained from the rented section.
- f. Issue escalation: If the University needed to escalate an issue (whether that be cleanliness or noise or security), many peer-to-peer accommodation providers do not provide a medium of escalation other than the owner.
- g. Neighbour management: While complaints can be given to the reception of a hotel about noisy neighbours and it is expected that management will act on those, many peer-to-peer accommodation providers do not offer such a service for their private providers who generally have no control over their neighbours.
- h. Privacy: Many peer-to-peer accommodation providers do not guarantee that the owners have not installed a hidden camera inside their home and are recording the travellers' activities.

Food, Drink and Incidentals

(28) The daily meals and incidental charges, both domestically and internationally, should be less than the local guides provided for the mid-tier annual salary range within the current [Australian Tax Office Taxation Determination](#) for reasonable travel and overtime meal allowance expense amounts. Valid tax invoices must be submitted for reimbursement.

Insurance

(29) Non-student University travellers are recommended to obtain their own travel insurance covering the entire journey whenever:

- a. the private travel component is scheduled to represent 50% or more of the duration of the entire journey.
- b. the private travel is above 28 days.
- c. the total travel is above 180 days.

(30) Otherwise the approved travel will be covered by the University's insurance policy.

(31) Student University travellers have no insurance coverage for personal travel at any stage of a University trip. If a student undertakes personal travel in conjunction with business travel, they are recommended to organise and personally pay for insurance for the entire trip. Time spent pre and post flights or long distance travel in the location of the approved activity for settling in and packing up is not taken to be personal travel.

(32) For the purposes of estimating insurance only, weekends are not taken to be private travel if the traveller undertakes business activities the gazetted workday prior to, and after, the weekend.

Time of Week

(33) Whenever possible, University travellers should fly mid-week and avoid the most expensive days and times to travel, which are Friday afternoons, Sunday nights and Monday mornings.

Festivals and Events

(34) University travellers should avoid travelling to a location when there is a large event or festival taking place.

Booking for the Next Calendar Year

(35) In accordance with Australian Accounting Standards, travel bookings made in the next calendar year will be expensed from the next calendar year's budget.

External Grants

(36) Travel funded through external grant arrangements must comply with the terms and conditions of the grant. Where there is an inconsistency between the terms of the external grant and the University's [Travel Policy](#) and Travel Manual, the terms of the external grant, with respect to travel, shall prevail, to the extent that any FBT liability that arises as a result of that travel event must be eliminated by the University traveller through:

- a. the reduction of private travel days to less than 50% of the trip duration,
- b. flight cost contribution or
- c. FBT repayment; and

(37) If the grant is silent on travel terms, the University's [Travel Policy](#) and Travel Manual apply.

Section 4 - Roles and Responsibilities

Part D - Delegated Officer's Responsibilities

Comply

(38) Delegated Officers must comply with this Travel Manual and its supporting documents.

Validate

(39) Prior to committing to the expenditure of money, an appropriate Delegated Officer must validate whether the travel is:

- a. Safe:- the travel is not to a high risk country or if so, the required Health and Safety risk assessment has been completed and appropriate approval has been obtained;
- b. Essential:- the travel expense is required, essential, beneficial, within cost centre budget and an appropriate use of University funds;
- c. Economical:- the travel is the most economical and effective outlay for its purpose, after considering alternative solutions and the economical requirements above have been met by the University traveller;
- d. Scrutiny:- the travel and associated costs are able to withstand public scrutiny;
- e. Funds:- there are sufficient funds in the nominated cost collectors / accounts;
- f. Official:- the travel is for official University business;
- g. Convenient:- the absence is convenient to the department/unit;
- h. Duration:- any travel duration limitations are satisfied;
- i. Same calendar year:- travel bookings should be for travel commencing in the current calendar year. Bookings for travel commencing in the next calendar year must be recorded as prepayments and expensed against the approver's next calendar year's budget;
- j. Travel diary:- a travel diary is completed with the proposed activities for each day of the trip and submitted for pre-approval for any travel that is 6 or more consecutive nights long, irrespective of whether private travel is included in the journey;
- k. Leave:- appropriate leave (annual, long service or leave without pay) is pre-booked for any week days that are scheduled to have less than 3 hours of a pre-approved business activity;
- l. FBT:- where the travel request gives rise to an FBT liability, in which case the University traveller must either amend the proposed travel request, in order to eliminate the FBT liability, or commit to pay the full FBT liability within 14 days of returning from the trip;
- m. Insurance:- the Non-student University traveller has been advised that they should obtain their own travel insurance covering the entire journey whenever:
 - i. the private travel component is scheduled to represent 50% or more of the duration of the entire journey.
 - ii. the private travel is above 28 days.
 - iii. the total travel is above 180 days.
- n. Compliant:- the travel expense is to be incurred in line with approved University policies and procedures;
- o. Entertainment:- any University related entertainment expenditure greater than \$500 must be pre-approved.
- p. Record keeping:- the record keeping requirements below have been met by the University traveller;
- q. Cost guidelines:- any accommodation, meals and incidental costs are within the cost guidelines, as per the mid-tier annual salary range within the current [Australian Tax Office Taxation Determination](#) for "Reasonable Travel and Overtime Meal Allowance Expense Amounts".
- r. Travel Management Company:- the travel is booked through the University's Travel Management Company, as per Clause 10, so that maximum value is obtained by the University; and
- s. Complete:- all relevant costs associated with international travel are fully captured on the travel request.

Approve

(40) All travel must be appropriately pre-approved and never self-approved.

(41) Pre-approval: all travel and travel diaries, as required for any travel that is 6 or more consecutive nights away from the University traveller's residence, must be endorsed by a supervisor and pre-approved by a Delegated Officer, who must be the University traveller's superior, prior to booking the travel.

(42) Post-approval: if a travel diary has changed during the trip, the University traveller must send an amended one to their Delegated Officer for approval. The latter must email the approved travel diary to finserv-taxation@newcastle.edu.au within 10 business days from the University traveller's return date.

(43) No self-approval: travellers must not, under any circumstances, authorise their own travel or the reimbursement of their own travel or entertainment expenses.

(44) No peer approval: a Delegated Officer must never authorise the travel expenses or requisitions from a fellow peer or a superior. All travel expenses or requisitions must be authorised by a Delegated Officer, who is also the University traveller's superior.

Part E - University Traveller's Responsibilities

Comply

(45) University travellers must comply with this Travel Manual and its supporting documents.

Record Keeping

(46) University travellers must:

- a. attach a conference itinerary/brochure (when the trip involves conference attendance) that proves the business relevance when submitting their travel request for pre-approval and also, if the trip requires a travel diary, attach it to the travel diary for pre-approval.
- b. retain evidence of business expenditure by submitting images and/ or the originals for all travel related receipts or tax invoices.
- c. if the pre-approved travel diary has not changed during the trip, submit the pre-approved travel diary to finserv-taxation@newcastle.edu.au within 10 business days from the return date.
- d. if the pre-approved travel diary has changed during the trip, submit the updated travel diary to the relevant delegated officer for approval within 10 business days from the return date.
- e. private days need to be booked as annual leave, long service leave or leave without pay, whether or not a travel diary is required.
- f. ensure funds are acquitted within the stipulated time frames, in accordance with the [Purchasing Card Policy and Procedures](#), in order to allow the University to meet its legal and taxation obligations.
- g. the acquittal for all travel expenses must identify the requisition number that each travel expense refers to.

Part F - College, Division and School Heads

(47) It is the responsibility of College, Division and School heads to ensure that University travellers and travel arrangers within their respective business units comply with the [Travel Policy](#) and this Travel Manual.

Status and Details

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Enquiries Contact	Travel

Glossary Terms and Definitions

"University" - The University of Newcastle, a body corporate established under sections 4 and 5 of the University of Newcastle Act 1989.

"Vehicle" - Has the same meaning as section 4 of the Road Transport Act 2013.

"Council member" - A person who is a member of the University Council as described in Section 8B of the University of Newcastle Act, 1989.

"Risk" - Effect of uncertainty on objectives. Note: An effect is a deviation from the expected, whether it is positive and/or negative.

"Risk assessment" - The overall process of risk identification, risk analysis, and risk evaluation.

"Complaint" - As defined in Australian/New Zealand Standard - Guidelines for complaint management in organisations.

"Credit" - When referring to course credit, credit is the recognition of equivalence in content and learning outcomes between different types of learning and/or qualifications. Credit can reduce the amount of learning required to achieve a qualification. For all other uses of this term, the generic definition applies.

"Student" - A person formally enrolled in a course or active in a program offered by the University or affiliated entity.

"Establishment" - When referring to an Award offered by the University, establishment means the process of approving an award that the University has decided to offer. For all other uses of this term, the generic definition applies.

"School" - An organisational unit forming part of a College or Division, responsible for offering a particular course.

"Staff" - Means a person who was at the relevant time employed by the University and includes professional and academic staff of the University, by contract or ongoing, as well as conjoint staff but does not include visitors to the University.

"Supervisor" - Staff members with direct supervisory responsibility for other staff within the workplace (a Supervisor may also be member of Senior Management, with duties as an Officer as defined in the Work Health and Safety Act 2011, or any replacing legislation).

"Term" - When referring to an academic period, term means a period of time aligned to an academic year for the

delivery of a course in which students enrol and for which they are usually charged fees for example semesters, trimesters, summer, winter or full-year term. The academic year for a term is determined by the academic year in which the course commences, not concludes. For all other uses of this term, the generic definition applies.

"University business" - Work that the University has directed to be undertaken which is required, essential, and beneficial for the functions of the University. This includes, but is not limited to, attending meetings, conferences or fieldwork, but does not include activity that is not location specific, e.g. email management, writing papers. University business may be undertaken by staff and non-staff.

"University traveller" - Persons travelling on pre-approved University business. Spouses, partners and dependants of the traveller are excluded.

"College" - An organisational unit established within the University by the Council.