



## Travel Procedures

### 1. STRATEGIC PLAN THEME AND COMPLIANCE OBLIGATION SUPPORTED

[Purchasing and Payment Policy](#)

[Risk Management Policy](#)

Strategic Plan Theme: [Sustainable Future](#)

### 2. PROCEDURAL DETAILS

Travel for business purposes will be:

- (a) managed with due regard for travel risk, allowing the University to meet its duty of care; and
- (b) undertaken with appropriate financial controls.

#### 2.3. Approval of travel for business related purposes

2.1.1. Travel involving:

- (a) air travel; and/or
- (b) overnight accommodation

is to be approved by a Travel Approver prior to booking the travel. Any such approval will be requested and given on the Travel Operations Portal (TOP).

2.1.2. Heads of Organisational Units will ensure that any travel not covered by Section 2.1.1 is approved prior to the travel being undertaken and that the whereabouts of the traveller are known.

2.1.3. Aspects of a travel request that require approval are:

- (a) the purpose of the travel;
- (b) the estimated travel costs (note that only estimated costs are required in the request. i.e. no formal quotes);
- (c) any request to exceed the class of travel as outlined in section 2.7 Travel booking: class of travel; and
- (d) travel to a destination having an alert level of “do not travel” or “reconsider your need to travel” as assigned by the Department of Foreign Affairs and Trade (DFAT) or Countries identified as High/Extreme Risk on the Risk & Assurance Website.

2.1.4. Travel to a destination having an alert level of “do not travel” as assigned by DFAT is to be approved by an appropriately delegated approver (refer Section 3.5). Prior to commencing a TOP travel request:

- (a) a written risk assessment and business case detailing the requirements and benefits of travel will be documented in consultation with Risk & Assurance; and
- (b) the traveller will obtain a security and medical briefing from the University's emergency travel service provider, and this is to be included in the risk assessment.

2.1.5. Travel to a destination having an alert level of “reconsider your need to travel” as assigned by DFAT is to be approved by an appropriately delegated approver (refer Section 3.5). As part of the TOP travel request:

- (a) a risk assessment will be completed; and
- (b) the traveller will obtain a security and medical briefing from the University's emergency travel service provider, which is to be included in the TOP request. The Executive Manager may liaise with Risk & Assurance prior to approving the travel request to ensure that the risk exposures relating to the destination are completely understood.

## 2.2. Risk Management

- 2.2.1. The University will assist, arrange for medical assistance to, repatriate or evacuate travellers (or any combination of these) where necessary for medical or other emergencies the traveller may experience.
- 2.2.2. While overseas, the traveller will carry the telephone number of the University's emergency travel service provider, download the mobile application, utilise the check-in functions within the mobile application and will contact the provider when experiencing a medical or security emergency.
- 2.2.3. Where a natural disaster/civil unrest/terrorist act etc. has occurred, and the traveller is contacted by the emergency travel service provider, the traveller will make every endeavour to return contact and notify that they are safe and/or what assistance they require (if any).
- 2.2.4. For travel to a destination assigned an alert level of "do not travel" or "reconsider your need to travel" by DFAT, the traveller will:
- (a) complete registration with [DFAT Smartraveller](#) prior to commencing travel (where eligible);
  - (b) ensure that their emergency contact (next of kin) details in Employee Kiosk are up to date;
  - (c) carry at all times a mobile telephone that is set up for international roaming and provide the number to the ~~travel facilitator~~ for updating the traveller profile. Where an international roaming number is not viable, the traveller will provide their WhatsApp contact number or Skype or FaceTime contact details;
  - (d) notify Curtin that they are safe, in the event of a natural disaster, civil unrest, terrorist act etc. and/or check in via Facebook (if applicable) that they are safe. Under such circumstances, the University may also send the traveller a direct message through Facebook Messenger;
  - (e) keep in regular contact with their nominated University supervisor (weekly at a minimum) by email or telephone or as agreed; and
  - (f) if DFAT assigns an alert level of "do not travel" or "reconsider your need to travel" after arrival, the traveller will register with their embassy or consulate immediately, and remain alert for communications from the University by telephone, email or mobile application.
- 2.2.5. The Vice-Chancellor, Provost, Deputy Vice-Chancellor Academic or Director Risk & Assurance may impose a complete travel ban to certain destinations and may require travellers to alter their travel itinerary or to return home. Travellers will comply with all such plans and directives.
- 2.2.6. Australian sanctions law imposes restrictions on certain countries. Travellers will check the [DFAT sanctions](#) website to ensure compliance when travelling to a sanctioned country.
- 2.2.7. Limitations are recommended when Senior Executive and Council members are travelling together, due to the risk of a serious accident occurring during travel, which may impact the University's leadership.
- Specifically, the following travelling combinations should be avoided, when travelling together by air:
1. The Chancellor and the Pro Chancellor;
  2. The Vice-Chancellor and the Provost;
  3. A Pro Vice-Chancellor and their Deputy Pro Vice-Chancellor
- There may be circumstances where lack of available carriers constrain application of this restriction. Such circumstances will be considered on a case by case basis, in consultation with Risk & Assurance.
- 2.2.8. Travellers will also comply with Information Security Risk protocols and directives for identified countries per the Curtin IT Services, [Information Security Advisory for Travel to High Information Security Risk Countries](#).

- 2.2.9. Fieldwork Supervisors/Coordinators are responsible for mandating travel risk protocols, including being available when called upon to manage travel incidents and emergencies that relate to travel that is not required to be documented in the Travel Operations Portal (refer Section 2.1.2).

### **2.3. Insurance**

- 2.3.1. Travellers undertaking approved business travel will be covered under the University's corporate travel insurance policy subject to the following conditions:
- (a) travel will be approved through the TOP system prior to travel;
  - (b) travellers with pre-existing medical conditions will declare them in TOP and obtain a [fitness-to-travel medical certificate](#) from their treating doctor prior to travel;
  - (c) travellers with pre-existing medical conditions will carry the prescribed medications and [fitness-to-travel medical certificate](#) on their person during travel; and
  - (d) travellers who have reached sixteen weeks pregnancy or will have reached sixteen weeks pregnancy at the time of air travel will contact Risk & Assurance prior to making a travel booking, as restrictions to insurance apply.
- 2.3.2. Incidental private travel, undertaken in conjunction with University business travel, is covered up to a maximum of two days. It is the responsibility of Travellers, to source and fund any personal insurance they may require, for any private travel component that exceeds the two day allowance.
- 2.3.3. The University will extend its business travel insurance to an accompanying partner/spouse, dependant/s or both (age limits apply), provided they are declared in the approved TOP request, and are travelling with or travelling separately from, but with the intention to meet and continue travelling with, the Curtin traveller travelling for the purpose of approved University business.
- 2.3.4. For domestic and international vehicle rental, travellers are required, at the time of renting the vehicle, to purchase comprehensive motor vehicle insurance, incorporating property damage and third party liability. The University corporate travel insurance policy only covers the vehicle rental insurance excess.

### **2.4. Travel diary**

- 2.4.1. Travellers who are University staff will confirm post-travel their final travel diary in TOP for all completed travel (domestic and international) that has a total travel period of more than five days.

### **2.5. Use of the University's Travel Management Company (TMC)**

- 2.5.1. Air travel that is paid in full or in part using University funds will be booked by a travel facilitator through the TMC, except local air travel originating outside Australia, which can be booked with a local supplier (i.e. a local airline or a local travel agent), after consultation with the Travel Operations team, if savings can be realised.
- 2.5.2. Details of air travel and accommodation not booked through the TMC will be provided to the travel facilitator for manual entry into the University's Travel Tracker System.

### **2.6. Travel booking: lowest practical fare**

- 2.6.1. The lowest practical fare complying with the class of travel as outlined in Section 2.7 Travel booking: class of travel will be booked for the traveller when the air fare is paid in full or in part using University funds.
- 2.6.2. In liaison with the TMC and the traveller, the travel facilitator will determine the lowest practical fare taking into consideration (among other factors):
- (a) airline scheduling including departure and arrival times, travel time and time in transit;
  - (b) the ability to provide connecting flights;
  - (c) price, taking into account relevant service costs that are included/excluded from the published fare (e.g. meal, baggage allowance);

- (d) fare conditions to suit business travel requirements; and
  - (e) the need to accompany another University traveller whose itinerary has been booked and the business needs require them to travel together.
- 2.6.3. Airline preferences, airline reward programs and preferences of accompanying family members will not be considerations in determining the lowest practical fare for the traveller.

## **2.7. Travel booking: class of travel**

- 2.7.1. All travel will be in economy class except for the Chancellor, Vice-Chancellor and Executive Managers who may choose to travel business class.
- 2.7.2. Air travel is only permitted on airline carriers rated safe as recommended by [Airline Ratings](#) Australia. Carriers on the banned list published by [the European Union \(EU\) Air Safety List](#) will not be considered.
- 2.7.3. Business class and premium economy travel may be undertaken by other staff in exceptional circumstances and when pre-approved by the Vice-Chancellor or an Executive Manager. Such requests will be considered on a case-by-case basis. In using this discretion, a number of circumstances may be considered, including when:
- (a) the traveller has a temporary and unusually high number of trips to undertake over a short period (e.g. five trips in one month);
  - (b) a medical certificate of a disability affecting travel requirements is provided.

## **2.8. Upgrades**

- 2.8.1. Travellers may choose to use personal funds or loyalty reward points to upgrade to business class or premium economy. When making this choice there can be no increase in the cost to the University and any increase in cost as a result of this will be paid for by the employee.
- 2.8.2. Upgrades using personal funds will be arranged directly with the TMC at the time of booking.
- 2.8.3. The traveller is to pay the difference between the lowest practical fare and the upgraded fare. Upgrades using loyalty reward points will be arranged directly between the traveller and their airline.

## **2.9. Travel booking amendments**

- 2.9.1. Amendments to ticketed fares will be kept to a minimum. That is, bookings will only be made once itinerary requirements are reasonably firm.
- 2.9.2. Amendments to approved travel may only be made by a travel facilitator. The travel facilitator will determine, based on direction from the appropriate Executive Manager, whether the amendment will require additional approval.
- 2.9.3. In exceptional circumstances where time restrictions or available technology do not allow for the travel facilitator to make the amendment as per 2.9.2, the traveller may amend a booking either directly with the TMC or with the appropriate supplier.
- 2.9.4. The traveller will keep the travel facilitator informed of any amendments to their itinerary during travel to enable the Travel Tracker System to be updated.

## **2.10. Travel booking: Accommodation**

### **2.10.1. Hotel accommodation**

The University has access to a significant number of attractive hotel rates globally.

These should be utilised wherever practicable and are available through the Travel Facilitators. Use of other hotels outside the University's hotel program are permitted (for example where a conference is located in a hotel), they need to be included with the travel approval request (including the approved budget) in TOP.

### **2.10.2. Airbnb**

Travellers may use Airbnb accommodation, provided:

- (a) the booking is made through a Travel Facilitator;

- (b) the Airbnb accommodation is not in a DFAT “reconsider your need to travel”, “do not travel” country or High/Extreme risk country as defined on the Risk & Assurance website;
- (c) the Airbnb accommodation is an entire home (i.e., it cannot be part of a home);
- (d) the traveller’s Curtin email address has been added to their Airbnb profile for travel tracking and security purposes; and
- (e) the traveller agrees to and meets the terms and conditions of Airbnb.

#### **2.11. Visitors and contractors who travel at the cost of the University**

- 2.11.1. The approval of travel funded by the University for visitors and contractors will be determined on a case-by-case basis utilising TOP.
- 2.11.2. If it is agreed that the University arranges such travel, then airfares will be booked through the TMC.
- 2.11.3. If it is agreed that the University will provide travel insurance to the visitor or contractor, then the details of the travel will be provided to a travel facilitator for updating into the Travel Tracker System.
- 2.11.4. The standards outlined in Section 2.7 *Travel booking: class of travel* apply to visitors and contractors who travel at the cost of the University.

#### **2.12. Travel with accompanying family members**

- 2.12.1. Travellers may be accompanied by a partner/spouse, dependant or both. At the traveller’s request the travel facilitator may arrange bookings for accompanying family through the TMC. Alternatively, the traveller may arrange for their flight booking to be linked to their accompanying family members directly with their airline. University funds will not be used to pay for family members.
- 2.12.2. Accompanying family members may not be covered by the University’s travel insurance - refer Section 2.3.

#### **2.13. Other provisions**

- 2.13.1. The University will pay for necessary visas and immunisations for approved international Travellers.
- 2.13.2. The University will pay for membership of airline priority clubs for frequent travellers on a case by case basis where approved by an Executive Manager.  
  
The University will pay the nomination fee to airline priority clubs once. Where a traveller allows a membership to lapse and wishes to re-join, the University will not pay a second nomination fee.
- 2.13.3. The University will not pay for seat selection when this is not included in the base fare.

#### **2.14. Exemptions to these procedures**

- 2.14.1. Exceptional circumstances may exist where an exemption from a requirement of these procedures is warranted. The Chief Financial Officer or nominee may, in writing, grant such an exemption.
- 2.14.2. In considering any application for exemption, the Chief Financial Officer or nominee may seek advice from:
  - (a) the Director Risk & Assurance for risk/insurance matters; or
  - (b) the Director Financial Operations & Strategic Procurement on all other matters.

### **3. RESPONSIBILITIES**

In addition to any responsibilities set out in Section 2:

- 3.1. Travellers are responsible for:
  - (a) applying for travel in TOP to ensure compliance with these procedures;
  - (b) checking the accuracy of their travel documentation as soon as practicable;
  - (c) understanding the conditions of their bookings and if they are able to be changed, cancelled or are non-refundable; and

- (d) ensuring that passports, relevant visas and immunisations are secured prior to undertaking travel.
- 3.2. Travel approvers are responsible for actioning approval requests in accordance with their delegated authority within one business day of receiving the completed request, unless the request is to a destination having an alert level of “do not travel”, “reconsider your need to travel” as assigned by DFAT or High/Extreme risk as defined on the Risk & Assurance website.
- 3.3. In the event that an area wishes to have a person check requests prior to approval then that person will be known as a travel reviewer. Travel reviewers are responsible for:
- (a) reviewing submitted travel requests for completion and correctness; and
- (b) allocating the travel request to the appropriate travel approver.
- 3.4. Travel approval authorities are summarised in the following table:

Approval authorities	Purpose of travel and budget estimate	Exceeding Travel Standard	Exemptions from Travel Procedures	Travel to DFAT ‘reconsider your need to travel’ destinations	Travel to DFAT ‘do not travel’ destinations
<b>Executive Manager’s Delegate</b>	✓	No authority	No authority	No authority	No authority
<b>Executive Managers</b> (other than as set out below)	✓	✓	No authority	✓	No authority
<b>Chief Financial Officer</b>	✓	✓	✓	No authority	No authority
<b>Vice-Chancellor, Provost and Deputy Vice-Chancellors</b>	✓	✓	No authority	✓	✓

#### 4. SCOPE OF PROCEDURES

These procedures apply to:

- (a) Travellers (including those on an academic study program); and
- (b) Visitors and contractors whose travel is paid for by the University.

Staff who are also students undertaking travel related only to their course of study are to follow [Travel Procedures for Students](#).

For the sake of clarity, these procedures do not apply to staff employed by other organisations, including those at overseas campuses, unless the travel is paid for by the University.

#### 5. DEFINITIONS

(Note: Commonly defined terms are located in the [Curtin Common Definitions](#). Any defined terms below are specific to this document)

##### **Booking**

The request to issue a ticket or confirmation of a reservation by committing funds.

##### **Dependant**

A person under 19 years of age (or under 25 years of age if in full-time education) and primarily dependent on the traveller, the traveller’s partner/spouse or both.

##### **DFAT**

Department of Foreign Affairs and Trade

##### **Emergency travel service provider**

An organisation contracted to the University that provides 24-hour assistance services for medical, travel and security emergencies.

**Lowest practical fare**

The lowest priced logical fare to allow the traveller the convenience and flexibility to complete the business purpose effectively and safely.

**Private travel**

Travel that is not for University business purposes.

**TMC**

Travel Management Company contracted to the University to provide travel management services.

**Travel Operations Portal (TOP)**

The University's corporate system used to request and approve travel.

**Travel approver**

An Executive Manager or a University officer authorised by an Executive Manager to approve domestic travel, international travel or both.

**Travel facilitator**

A person who has been approved to book travel for and on behalf of Travellers.

**Travel tracker system**

A database linked to the TMC that reports the destination and contact details of Travellers.

**Traveller**

A person (not a University visitor, contractor or student) on approved University business away from the primary place of work or study regardless of the source of funding for the travel.

**6. SCHEDULES**

Nil

**7. RELATED DOCUMENTS/LINKS/FORMS****Policies and procedures**

[Purchasing Procedures](#)

[Travel Procedures for Students](#)

[Academic Study Program Procedures](#)

**Relevant webpages and documents**

[DFAT Smartraveller webpage](#)

[DFAT Sanctions webpage Curtin Travel Webpage Fieldwork Safety Guidelines](#)

[Fitness-to-travel medical certificate Incidental Expenditure Guidelines](#)

[Travel Employee Contribution Calculator Travel Approval Form](#)

[Travel Insurance Policy](#)

[Travel Operations Portal \(TOP\)](#)

Claim for [Mileage/Motor Vehicle Allowance](#)

<b>Policy Compliance Officer</b>	<a href="#"><u>Philip Thomas</u></a> , Director, Financial Operations and Strategic Procurement
<b>Policy Manager</b>	Chief Financial Officer
<b>Approval Authority</b>	Chief Financial Officer
<b>Review Date</b>	1 April 2022

## REVISION HISTORY

Version	Approved/ Amended/ Rescinded	Date	Committee / Board / Executive Manager	Approval / Resolution Number	Key Changes and Notes
	Approved	12/02/2008	Planning and Management Committee	PMC 01/08	Attachment A to Document No 00087/08
	Administratively Updated	20/03/2008	Director, Legal and Compliance Services		Reformatted and Amended to Reflect Organisational Chart
	Amended	25/08/2009	Planning and Management Committee	PMC 85/09	Attachment A to Document No 01130/09
	Administratively Updated	04/04/2011	Director, Legal and Compliance Services		Minor Text Amendments
	Approved	27/08/2012	Chief Financial Officer	EM1218	Signed off 27 August 2012, formerly titled the Travel Policy and Procedures (reformatted as per new policy framework), effective 3 September 2012
	Amended	18/01/2013	Chief Financial Officer	EM1301	Unconditional
	Amended	05/06/2013	Chief Financial Officer	EM1312	Unconditional
	Amended	07/10/2013	Chief Financial Officer	EM1320	Unconditional
	Amended	18/11/2013	Chief Financial Officer	EM1325	Unconditional
	Administratively Updated	04/03/2014	Director, Legal and Compliance Services		Title change from Deputy Vice- Chancellor, Academic to Provost and Senior Deputy Vice-Chancellor
	Administratively Updated	06/10/2015	Director, Legal and Compliance Services	EC 76/15	Executive Manager Title Changes
	Amended	16/05/2016	Chief Financial Officer	EM1615	Unconditional
	Amended	17/05/2017	Chief Financial Officer	EM1708	Section 3.12 amended to provide for approval of exceptions by nominee
	Amended	11/07/2017	Chief Financial Officer	EM1712	Unconditional
	Amended	06/10/2017	Chief Financial Officer	EM1722	Unconditional
	Approved	26/06/2018	Chief Financial Officer	EM1811	Unconditional (Commencement 9th July 2018)