



Travel Procedures

1. LEGISLATION/ENTERPRISE AGREEMENT/POLICY SUPPORTED

[Purchasing and Payment Policy](#)

[Risk Management Policy](#)

2. IMPLEMENTATION PRINCIPLES

2.1. Travel for business purposes will be:

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

3. PROCEDURAL DETAILS

3.1. Approval of travel for business related purposes

3.1.1. Travel involving:

- (a) air travel; 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 Approval System (TAS).

3.1.2. Heads of Organisational Units will ensure that any travel not involving air travel or overnight accommodation is approved prior to the travel being undertaken and that the whereabouts of the traveller is known.

3.1.3. 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 travel standards in Schedule A: Air Travel Standards; 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).

3.1.4. Travel to a destination having an alert level of “do not travel” as assigned by DFAT is to be approved by the Vice-Chancellor, Provost or Deputy Vice-Chancellor Academic. Prior to commencing a TAS travel request:

- (a) a written risk assessment and business case detailing the requirements and benefits of travel will be documented in consultation with Risk Management; 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.

3.1.5. Travel to a destination having an alert level of “reconsider your need to travel” as assigned by DFAT is to be approved by an Executive Manager. As part of the TAS 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 TAS request.

The Executive Manager may liaise with Risk Management prior to approving the travel request if unsure of risk exposures relating to the destination.

3.2. Risk management

- 3.2.1. 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.
- 3.2.2. While overseas, the traveller will carry the telephone number of the University's emergency travel service provider and will contact the provider when experiencing a medical or security emergency.
- 3.2.3. 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;
 - (a) 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; and
 - (b) keep in regular contact with their nominated University supervisor (weekly at a minimum) by email or telephone.
- 3.2.4. If DFAT assigns an alert level of "do not travel" or "reconsider your need to travel" after arrival, the traveller is to register with their embassy or consulate immediately and remain alert for communications from the University by telephone or email.
- 3.2.5. The Vice-Chancellor, Provost, Deputy Vice-Chancellor Academic or Director Risk Management 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.
- 3.2.6. Australian sanctions law imposes restrictions on certain countries. Travellers will check the [DFAT sanctions](#) website to ensure compliance when travelling to a sanctioned country.

3.3. Insurance

- 3.3.1. Travellers undertaking approved business travel will be covered under the University's corporate [travel insurance policy](#) subject to the following conditions:
 - (a) travellers with pre-existing medical conditions are to declare them in TAS and obtain a [fitness-to-travel medical certificate](#) from their treating doctor prior to travel;
 - (b) travellers with pre-existing medical conditions are to carry the prescribed medications and [fitness-to-travel medical certificate](#) on their person during travel; and
 - (c) travellers who have reached sixteen weeks pregnancy or will have reached sixteen weeks pregnancy at the time of air travel are to contact Risk Management prior to making a travel booking, as restrictions to insurance apply.
- 3.3.2. The University will provide comprehensive travel insurance to Travellers for travel on University business approved through the TAS system and limited insurance cover for [Private Travel](#) associated with University business travel. Details of the amount of limited insurance are provided in [Travel Insurance Policy Information](#). It is the responsibility of Travellers to source and fund additional insurance for private travel in excess of the University allowance.
- 3.3.3. The University will extend travel insurance to an accompanying partner/spouse, [dependants](#) or both, provided they are travelling to the same destination for the same period of time the traveller is insured by the University (i.e., while travelling for business purposes) and they are declared in the TAS travel request.
- 3.3.4. For domestic and international vehicle rental, travellers are to buy comprehensive motor vehicle insurance incorporating property damage and third party liability. The University corporate travel insurance policy will only cover the vehicle rental claim excess.

3.4. Private travel funding

- 3.4.1. A traveller may include private travel in their itinerary provided:
- (a) the traveller contributes a portion of the cost of the airfare so that the University only funds the portion attributable to business purposes. The portion will be determined using the University's Travel Employee Contribution Calculator. The employee contribution will be made prior to commencing travel;
 - (b) the private component of the travel does not impact on any aspect of the business travel including, but not limited to, itinerary, choice of airline or travel standard;
 - (c) The University will fund no more than the cost of the travel had the lowest practical fare not included private travel; and
 - (d) leave has been approved for the period relating to the Private Travel component.

3.5. Travel diary

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

3.6. Use of the University's Travel Management Company (TMC)

- 3.6.1. 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 that is booked with a local supplier (i.e. a local airline or a local travel agent) where savings can be realised, subject to the traveller complying with the University's risk management processes.
- 3.6.1. 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.

3.7. Travel booking: lowest practical fare

- 3.7.1. The lowest practical fare complying with the air travel standards defined in Schedule A will be booked for the traveller when the air fare is paid in full or in part using University funds.
- 3.7.2. 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.
- 3.7.3. Airline preferences, airline reward programs and preferences of accompanying family members will not be considerations in determining the lowest practical fare for the traveller.

3.8. Travel booking: amendments

- 3.8.1. Amendments to ticketed airfares will be kept to a minimum. That is, bookings are only to be made once itinerary requirements are reasonably firm.
- 3.8.2. 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.

- 3.8.3. In exceptional circumstances where time restrictions or available technology do not allow for the travel facilitator to make the amendment as per 3.8.2, the traveller may amend a booking either directly with the TMC or with the appropriate supplier.
- 3.8.4. 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.

3.9. Visitors and contractors who travel at the cost of the University

- 3.9.1. The approval of travel funded by the University for visitors and contractors will be determined on a case-by-case basis.
- 3.9.2. If it is agreed that the University arranges such travel, then airfares will be booked through the TMC.
- 3.9.3. 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.
- 3.9.4. The standards referred to in Schedule A apply to visitors and contractors who travel at the cost of the University.

3.10. Travel with accompanying family members

- 3.10.1. 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.

3.11. Other provisions

- 3.11.1. The University will pay for necessary visas and immunisations for approved international travel.
- 3.11.2. The University will pay for membership of airline priority clubs for frequent travellers on a case by case basis where authorised by a travel approver.

The University will pay the nomination fee to airline priority clubs once (i.e. where a traveller allows a membership to lapse and wishes to re-join, the University will not pay a second nomination fee).

3.12. Exemptions to these procedures

- 3.12.1. 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.
- 3.12.2. In considering any application for exemption, the Chief Financial Officer or nominee may seek advice from:
 - (a) the Director Risk Management for risk/insurance matters; or
 - (b) the Director Financial Operations & Strategic Procurement on all other matters.

4. RESPONSIBILITIES

In addition to any responsibilities set out in Section 3:

4.1. Travellers are responsible for:

- (a) applying for travel in TAS 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.

- 4.2. Executive Managers are able to approve one travel facilitator in addition to dedicated travel facilitators.
- 4.3. 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” or “reconsider your need to travel” as assigned by DFAT.
- 4.4. 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.
- 4.5. Summary of travel approval authorities are summarised in the following table

Travel Approver	Matters requiring approval prior to booking and travelling				
	Purpose of travel and budget estimate	Exceeding Travel Standard	Exemptions from Travel Procedures	Travel to 'reconsider your need to travel' DFAT destinations	Travel to 'do not travel' DFAT destinations
Executive Manager's Delegate (Domestic and/or International as delegated by Executive Manager)	✓	No authority to approve	No authority to approve	No authority to approve	No authority to approve
DVC Research, DVC International, VP Corporate Relations, Chief Operating Officer, Chief Strategy Officer and PVCs	✓	✓	No authority to approve	✓	No authority to approve
Chief Financial Officer	✓	✓	✓	✓	No authority to approve
Vice-Chancellor, Provost and DVC Academic	✓	✓	No authority to approve	✓	✓

5. SCOPE OF PROCEDURES

- 5.1. These procedures apply to:
- (a) travellers (including those on an academic study program); and
 - (b) visitors and contractors whose travel is funded by the University.

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

6. 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 approval system (TAS)

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.

7. SCHEDULES

Schedule A – Air Travel Standards

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

- [Purchasing Procedures](#)
- [Travel Procedures for Students](#)
- [Academic Study Program Procedures](#)

DFAT webpages

- [DFAT Smartraveller webpage](#)
- [DFAT Sanctions webpage](#)

Other relevant webpages

[Curtin Travel Webpage](#)

[Fieldwork Safety Guidelines](#)

[Fitness-to-travel medical certificate](#)

[Incidental Expenditure Guidelines](#)

[Per Diem Payments \(Payroll Process\)](#)

[Travel Approval System \(TAS\)](#)

[Travel Employee Contribution Calculator](#)

[Travel Approval Form](#)

[Travel Insurance Policy](#)

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

Policy Compliance Officer	Philip Thomas , Director, Financial Operations and Strategic Procurement Financial Services
Policy Manager	Chief Financial Officer
Approval Authority	Chief Financial Officer
Review Date	1 st April 2020

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

SCHEDULE A: Air Travel Standards

The following standards apply to air travel:

Position	Continuous trip of 6 hours or less	Continuous trip greater than 6 hours
Chancellor, Vice-Chancellor	Business Class	Business Class
Executive Manager	Business Class	Business Class
All other travellers	Economy	Economy

1.1. Exception to the Air Travel Standards

Domestic and international business class and premium economy travel outside the Air Travel Standards may be undertaken 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. three trips in one month);
- (b) a medical certificate of a disability affecting travel requirements is provided; and

1.2. Upgrades

Travellers may choose to upgrade to domestic and international business class or premium economy using personal funds or loyalty reward points.

Upgrades using personal funds will be arranged directly with the TMC at the time of booking. 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.