

# INTERNATIONAL TRAVEL (AUSTRALIAN-BASED STAFF) PROCEDURE

## SCOPE

All staff, herein collectively referred to as 'you' for the purpose of this procedure, engaging in international travel for University business from the University's Australian campuses and centres are required to comply with this procedure and to lodge a travel request in our Travel Management System (TMS). All international travel should be booked through our approved Travel Management Companies.

## PROCEDURE STATEMENT

This procedure outlines the requirements for staff travelling overseas on University business and has been developed to facilitate:

- comprehensive planning to utilise the trip most effectively;
- University contact with the travelling staff member in the event of any emergencies or unexpected occurrences;
- comprehensive budgeting for travel on behalf of both the staff member and the funding entity; and
- the University's ('us', 'our' or 'we') commitment that all its dealings are characterised by openness and transparency and conform to best academic and financial standards.

The following is a step-by-step procedure for seeking approval, booking and reconciling international travel.

### 1. Approval for travel

1.1 All work-related international travel must be approved whether or not we are paying for any of the travel costs. If you are undertaking travel on behalf of the University, you must prepare and submit a travel request via the TMS prior to departure from your home campus. The [Monash Travel](#) webpage is available to assist you with:

- setting up a user profile;
- completing all requisite information for a travel request as outlined in 1.2 Travel request below; and
- researching international travel via the 'Travel' tab in the Concur system.

#### Travel request

1.2 All requests for approval to travel must include the following information:

- Primary purpose of the trip;
- Outline of proposed work activities and the outcomes anticipated for us, attaching supporting documentation (e.g. conference programs, conference paper acceptances, emails confirming arrangements, or letters of invitation);
- Trip details including planned itinerary, departure and arrival locations and dates;
- Cost estimate including fares, accommodation and other travel costs for budget and approval purposes (see 2. Booking travel for guidance on obtaining estimates);
- Passport/s number and country of issue;
- Emergency contact details: name and telephone number (not a co-traveller);
- DFAT advisory status (current) of intended destinations;
- List of visas required;
- Selection of the TMC through which travel will be booked or non-Monash approved travel agent; and
- Leave requests completed within the leave component of ESS (if applicable).

## Private travel and Fringe Benefits Tax (FBT)

- 1.3 Generally, if 30% or more of a business trip comprises personal days of leave or if you intend to change location to engage in personal travel, Corporate Finance will contact you to discuss the FBT that will be payable on the trip and the proportion of the airfare that you will be expected to pay, prior to your departure.
- 1.4 For the purposes of this procedure, "personal days of leave" generally does not include weekends (unless the weekend is between periods of personal leave), University holidays or periods of reasonable rest and recuperation following a long-haul international flight.
- 1.5 For further information on FBT and travel, refer to the [Fringe Benefits Tax - Travel Procedures](#).

## Security risk assessment

- 1.6 The TMS will advise you to read the Department of Foreign Affairs Trade (DFAT) travel advisory for each travel destination entered in your request. The DFAT Travel Advisory is available on the [DFAT website](#).
- 1.7 DFAT uses 4 risk advice levels:
  - Exercise Normal Safety Precautions
  - Exercise a High Degree of Caution
  - Reconsider your need to Travel
  - Do Not Travel
- 1.8 If the travel request proposes travel to a DFAT level 1 "Exercise normal safety precautions" or level 2, "Exercise a high degree of caution" then you can proceed to Authorisation of the travel below.
- 1.9 Where the DFAT travel advisory for a proposed destination is level 3, "Reconsider your need to travel" or level 4, "Do not travel" the TMS will direct you to:
  - Carefully check all the locations you propose travel to and or through to see if any of these are actually in the DFAT advisory level 3 or 4 identified areas (Note: some countries have multiple DFAT levels within their borders).
  - Complete and attach a [Security/Safety Plan](#) to the TMS if any portion of the proposed travel does involve travel to or through any DFAT level 3 or 4 identified area. (Note: a [Security/Safety Plan](#) is only required to be completed if the travel includes actual travel into those DFAT identified level 3 or 4 areas – i.e. a region, city or precinct).
  - Contact our Security Office via [travelsecurity@monash.edu](mailto:travelsecurity@monash.edu) for advice where the applicant will be travelling through a DFAT rated 3 or 4 area, but is unsure whether a Security safety plan is required.
- 1.10 Where a [Security/Safety Plan](#) is required but is not attached to the TMS or has insufficient information, the Security Manager may contact or refer the request back to you seeking further information.
- 1.11 The Security Manager will consider each request for travel to a DFAT level 3 or 4 destination on a case-by-case basis using the information available and will make a recommendation to the relevant approver. The recommendation will include:
  - an assessment of whether the trip is considered high-risk by us; and
  - where a trip is assessed as high-risk, proposals for mitigating the risk or a recommendation that you do not engage in the travel.
- 1.12 All travel assessed by the Security Manager as high risk will be forwarded to your Dean or Executive Director for consideration of approval. The Security Manager may also refer some high-risk travel requests to the Chief Operating Officer and Senior Vice-President for consideration of approval.
- 1.13 Where the Security Manager confirms that the travel is high risk, the relevant approver must verify that they are satisfied that:
  - the travel cannot reasonably be deferred;
  - the travel is essential for your work, work unit or research program;
  - you are fully aware of potential risks in the country and cities you are visiting and will engage in suitable risk reduction strategies, including those proposed by the Security Manager; and
  - you have the necessary local networks, support and language that may be required to substantially reduce or deal with the risks.
- 1.14 Travel insurance cover will be provided under our Travel Insurance Policy, including that any limitations on the insurance provided for the high-risk destination are acceptable to the relevant approver.

## Authorisation of the travel

- 1.15 International travel may be authorised for any of the following activities:
  - attending a conference, symposium, colloquium or workshop;
  - taking up and returning from an expatriate posting;
  - undertaking an OSP which has been fully endorsed by us;

- conducting commercial business on behalf of us, including consulting;
- specific approved tours, such as touring orchestra, choir or sports team;
- travelling scholarship;
- undertaking research and fieldwork;
- visiting fellowships at overseas universities/institutions;
- appointing of overseas Chairs;
- teaching and training at offshore locations;
- undertaking marketing and business development activities;
- visiting offshore campuses and/or centres; and
- external secondments approved and funded by us.

1.16 International travel may also be authorised for other activities with pre-approval in the TMS.

1.17 A decision to authorise or approve international travel must be based on:

- whether the intended travel is a component of your work for us;
- for high-risk travel, the recommendation of the Security Manager (see 1.3 Security risk assessment above);
- an understanding of any limitations on the travel insurance provided for the intended destinations (see the [Business Travel Insurance](#) webpage for further information); and
- where the travel is funded by a research grant, an understanding of any restrictions and limitations that may be imposed by the grant funding organisation.

1.18 Travel is approved via a two-step approval process that is managed electronically in our TMS. When you submit a travel request via the TMS, the relevant approvers will be notified of the requests awaiting approval.

1.19 All requests will be submitted to:

- a level 1 approver who is usually your supervisor; and
- a level 2 approver with the appropriate financial delegation to approve the cost of the proposed travel.

1.20 If approver 1 and 2 are the same person, then approval will only be sought once. All approvers can elect to use a delegate at their discretion however, the authority to approve premium economy or business class travel cannot be delegated.

1.21 Where you are travelling to a high risk country as outlined in 1.6 Security Risk Assessment above, the request will automatically be submitted to the Security Manager for review once the travel has been approved. Additionally, the Dean or Executive Director will be required to approve the travel and in some circumstances, the Chief Operating Officer and Senior Vice-President.

## Insurance

1.22 The TMS will direct you to obtain an insurance cover certificate via a link to the [Business Travel Insurance](#) website, which includes guidance on how to apply for an insurance certificate and all requirements relating to the insurance coverage, including (without limitation):

- the obligation to declare a pre-existing medical condition;
- the limits applicable to travel to high-risk destinations;
- the requirement that electronic equipment accompany you as cabin luggage; and
- the limits on coverage for any private component of the travel.

1.23 Upon request approval, an email will also be sent to you with a link to the Business Travel Insurance Website to download the certificate. A copy of the insurance certificate should be carried at all times during travel.

## Health and vaccinations

1.24 There are potential health risks that are prevalent in some overseas countries, therefore you should take all the appropriate steps prior to travel to ensure your health, safety and wellbeing.

1.25 We recommend that you contact a recognised travel health professional to discuss pre-travel health checks and vaccinations at least 4-6 weeks prior to departure.

1.26 Further information on pre-health checks and vaccinations is available via the website for the [Australian Government](#).

1.27 Additionally please review the [Monash OHS Immunisation Procedure](#).

## 2. Booking travel

- 2.1 You are responsible for organising all travel details, including applying for visa and/or work permits, booking flights and accommodation.

### Payment of bookings and other travel-related expenses

- 2.2 Bookings arranged and purchased through a Monash approved TMC will be charged directly to a University cost centre and fund as advised by you or delegate to the TMC. Therefore, where you book flights and/or accommodation (travel) with an approved TMC, your receipts will not need to be collected or acquitted in the Concur Expense module.
- 2.3 You or delegate to the TMC should ensure the travel itinerary is stored in the TMS.
- 2.4 All expenses incurred during work-related travel and paid for by a University corporate card or your personal credit card will still require acquittal via the Concur Expense module.
- 2.5 For bookings via a non-approved travel agent, a University corporate credit card is to be used as the method of payment in accordance with our [Corporate Credit Card Policy](#).
- 2.6 Authorised business travel and related costs that cannot be paid using a corporate credit card will be reimbursed on presentation of substantiated receipts and a completed Travel Diary, at the completion of the travel (see 3. Reconciliation and Travel Diary).
- 2.7 You may choose to undertake part of the work commitment documented in your travel request (e.g. OSP or conference participation) at your personal expense.
- 2.8 Any personal travel expenses, including those identified by Corporate Finance as per 1.3 Private travel and FBT, must be paid separately by you using a personal credit card or personal funds.

### Bookings

- 2.9 If you travel on behalf of the University, regardless of the source of funds used for travel and the duration of travel, you are required to book international travel through one of the Monash approved TMCs except where:
- frequent flyer points are used to purchase the flight;
  - the airfare or travel expenses are being paid for directly by an external party (e.g. flight is paid directly to the travel agent/airline by an external organisation), including funded privately by you;
  - a research grant requires specific travel arrangements that the TMCs cannot accommodate; or
  - a research student obtains a (cheaper) student fare.
- 2.10 Travel bookings should be made as early as possible with ticketing to be effected at least 3 to 4 weeks prior to travel.

### Travel class

- 2.11 Our Senior Management Team, Senior Vice-Presidents, Deputy/Pro-Vice-Chancellors, Vice-Provosts, Deans and Executive Directors are eligible to travel premium economy, mixed economy/business or business class where due consideration has been given to whether the purpose of the travel justifies the cost.
- 2.12 Only our Senior Management Team, Senior Vice-Presidents, Deputy/Pro Vice-Chancellors, Vice-Provosts, Deans and Executive Directors are permitted to approve all other premium economy, mixed economy/business or business class travel. This authority cannot be delegated.
- 2.13 If you fall in the following categories, you may seek permission from your Dean or Executive Director for payment of a premium economy or business class ticket for overseas travel:
- if it forms part of a contract of employment, or
  - is required for exceptional health reasons and supported by a medical certificate.
- 2.14 Economy class airfares must apply in all other instances.

### Best fare of the day

- 2.15 Where possible, you must accept the best fare of the day. The best fare of the day is the lowest fare offered by any airline at the time of booking, provided that the fare satisfies your business requirements (including but not limited to time of flight/s, class and connecting services).
- 2.16 Where you take a higher cost option, you must prepare a written justification and include this in the 'Comments' area in the request.

### Airline clubs and Frequent Flyers

- 2.17 You are eligible to access the special corporate rate offer for memberships to Qantas Club and Virgin Australia's 'The Lounge'. For details on rates, refer to our [Airline Memberships](#) website.

2.18 We will not pay airline club or Frequent Flyer memberships unless:

- it is part of a salary packaging arrangement; or
- an academic staff member uses external research funds to pay for the membership, provided the funding grant permits funds being used for these purposes and provided further that the head of unit approves; or
- an academic staff member uses consulting funds from approved [Paid Outside Work](#) to pay for the membership and the head of unit approves.

2.19 Where you utilise one of the above options, you must pay for the airline club or Frequent Flyer membership and seek reimbursement from us. Under no circumstances can you use your corporate credit card to pay for an airline club or Frequent Flyer membership.

## Carbon offsets

2.20 We recognise our responsibility to practice and promote environmental sustainability within the local, national and international community and so we have committed to decreasing our carbon footprint through various [initiatives](#). You are encouraged to demonstrate responsibility for your own carbon footprint and purchase carbon offsets. These will not be reimbursed by us.

## Accommodation

2.21 Accommodation may be booked through one of the TMCs or directly with an accommodation provider.

2.22 The choice of accommodation while travelling should be based on safety and security while enabling optimal working conditions and should:

- provide a safe and secure environment;
- be convenient to the place of work; and
- provide value for money appropriate to the country (i.e. in many countries, appropriate accommodation will be at the 3 to 4 star rating level).

2.23 When you are funding your own expenses for overseas work, it is recommended that the same principles are applied.

2.24 You may book accommodation in online accommodation marketplaces (for example Airbnb) in cities where they operate legally, provided that you take all appropriate measures to ensure your safety and assist the University in exercising our duty of care.

2.25 You are required to agree to the terms of conditions of the non-commercial accommodation provider (for example Airbnb) when the booking is made. The agreement is between you and the non-commercial accommodation provider and not the University.

2.26 You may book Airbnb accommodation or use other online accommodation marketplaces provided that:

- the accommodation is in a DFAT 1 level 1 or level 2 country;
- the accommodation is an entire home (i.e. cannot be part of a home or in a shared space); and
- you use your Monash University email address to book the accommodation.

2.27 All details relating to your accommodation must be recorded in the University's TMS.

2.28 In order to select appropriate accommodation, you should:

- check the location where your work is to be undertaken;
- determine the availability of local transport in the areas to be visited;
- review the types of accommodation available in the area;
- request advice on accommodation from the TMCs; and
- obtain an estimate of the total accommodation cost to include in the travel request for approval.

2.29 The cost of accommodation should not exceed AU\$300 per night (at the time of booking). Where the cost of accommodation exceeds this amount, the justification for selecting such accommodation must be documented in the travel request for approval by the relevant approver.

2.30 You must identify any accommodation or associated costs which are not business-related (e.g. mini-bar and newspapers) or are incurred as a direct result of the attendance of an accompanying person or family member. These costs are considered to be of a personal nature and must be paid separately to the business expenses of travel by you using a personal credit card or personal funds. For more information, refer to our [Staff Expense Guidelines](#).

## Visa/work permit requirements

2.31 You must meet the entry and visa requirements of all countries you are visiting, transiting through or working in. It is your responsibility to ensure that you have a valid passport which is not due to expire within six months of the last day of planned travel.

2.32 We also recommend that prior to travelling, you should have at least 10 blank pages in your passport. Further, if travelling to Africa or the Middle East, there must be at least two blank pages facing each other for each country visited to allow for entry/exit border control stamping.

- 2.33 Please check the expiry date of your passport and the number of blank pages. If in doubt, confirm your passport's validity with the [Australian Passport Information Service](#) on 131 232.

### Accompanying family members

- 2.34 Costs associated with accompanying family members must not be charged to University funds. If booking accompanying family members through one of our TMCs, all associated costs are to be charged to your personal credit card or other personal funds.

### Transport

- 2.35 Where public transport is a safe and economical means of travelling locally, consideration should be given to using it.
- 2.36 Where public transport is not available or is considered unacceptable, you may hire a car. All car hire must be approved. Car rental bookings should be made through one of the TMCs or the approved car rental company (currently Avis), unless impractical due to OSP funding paid directly into your personal account. Approved car hire booked through a TMC will be billed centrally to a cost centre and fund, in all other circumstances you should pay with a corporate credit card.
- 2.37 Any private use of a hire car must be paid separately by you using a personal credit card or personal funds. This may include the payment of some running costs where the hire car is used on a day for business and private purposes or where the hire car is used exclusively for private use on a number of days. If you use a car hire for private purposes, you must enter into a separate contract with the hire car company for the period of private use.
- 2.38 If hiring a car overseas for any University business, you only need to take out the basic insurance excess offered by the motor vehicle hire company. For more information, refer to the [Business Travel Insurance](#) website.
- 2.39 You are permitted to use taxis and ride sharing providers in cities where they operate legally (e.g. Uber) for University business. When using Uber, you will need to create a business account in the Uber app where business trips and bookings can be made.
- 2.40 University funds can be used to pay for transportation when:
- you are travelling to the airport;
  - you are travelling to a corporate function/event;
  - you work late and travel home well outside normal work hours, i.e. 7pm outside of daylight saving periods or and 8pm during daylight saving periods (or summer, in non-daylight saving states); or
  - there are other valid business reasons approved by your supervisor.

### Final itinerary

- 2.41 Once the request has been approved and travel booked, you must attach the final itinerary and any other pertinent information to the request.

### Pre-departure briefings and cultural training

- 2.42 Where cultural training is a mandatory part of the overseas program, this will be provided by us. Your HR Business Partner is the primary point of contact to arrange pre-departure briefings.

### Undertaking travel

- 2.43 During the period of travel, you will:
- only engage in travel and associated activities that were authorised in the travel request;
  - pay for any authorised expenses using the corporate credit card, where possible;
  - retain receipts of all transactions relating to the business travel; and
  - carry a copy of the travel insurance certificate at all times.
- 2.44 If you are engaging in high-risk travel as assessed by the Security Manager in 1.6 Security Risk Assessment, you must also:
- register with your home embassy in that country upon arrival;
  - keep your contact details current at all times with us and the embassy; and
  - regularly check your email and make contact with your home office to monitor the security status of the areas you are visiting.
- 2.45 If there is an emergency or threatening situation during the period of travel, you must maintain contact with the home embassy and us (via the relevant approver for the travel). The University Security Manager will also be monitoring your locations via the TMS and will utilise the contact information within your Profile to reach you in times of emergency.
- 2.46 Before taking any action to evacuate, you should contact the embassy and the Monash Business Travel Insurer (whose details will be provided on the travel insurance certificate).

### 3. Reconciliation and travel diary

- 3.1 As soon as practicable after completion of the travel, you must complete a Travel Diary which must be attached within the TMS, in accordance with the requirements of the [Fringe Benefits Tax – Travel Procedures](#). The travel request prepared at 1.2 Travel Request will provide travel destination details required for the Travel Diary which could comprise a single document or multiple documents in order for the required information to be provided. A pdf of a calendar or document which includes business related appointments, meetings or conference involvement must also be attached to the travel request in the TMS after completion of the trip. This document must include your signature and a statement that “This is a true record of my trip”.
- 3.2 You will also acquit the corporate credit card in accordance with the [Corporate Credit Card Procedures](#) and/or seek reimbursement for any authorised business travel expenses using the [Reimbursement Procedures](#).
- 3.3 Reimbursements for cash up to AU\$20 per day do not require a receipt. Individual credit card expenses up to AU\$75 do not require a receipt. However, you must keep records of both cash and card expenses to claim them in Concur Expenses module.

### 4. Breach of procedure

- 4.1 We treat any breach of our policies or procedures seriously. We encourage reporting of concerns about non-compliance and manage compliance in accordance with the applicable Enterprise Agreement or contract terms.

## DEFINITIONS

Concur Expense Module	The University's expense reimbursement system, <a href="#">Concur</a> .
DFAT	The Commonwealth Government's Department of Foreign Affairs and Trade.
OSP	The University's Outside Studies Programme, detailed in the <a href="#">Outside Studies Programme procedure</a> .
TMCs	The Travel Management Company supplier which is Corporate Travel Management (CTM) <a href="#">CTM Travel Portal</a> .
TMS	The University's Travel Management System, currently <a href="#">CTM Travel Portal</a> .
Travel Request	Outlines the details of the staff member's travel and can be completed via the TMS.

## GOVERNANCE

Parent policy	<a href="#">Employment conditions</a>
Supporting schedules	
Associated procedures	<ul style="list-style-type: none"><li>• <a href="#">Corporate Credit Card</a></li><li>• <a href="#">Fringe Benefits Tax – Travel</a></li><li>• <a href="#">Outside Studies Programme</a></li><li>• <a href="#">Reimbursement</a></li></ul>
Legislation mandating compliance	
Category	Human Resources
Approval	Chief Human Resources Officer as delegate of the Chief Operating Officer - 12 June 2018
Endorsement	Director, Workplace Relations - 12 June 2018
Procedure owner	Director, Recruitment, Remuneration & Global Mobility
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Version	10



Content enquiries

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