



Travel Procedures

TABLE OF CONTENTS

1. PURPOSE	2
1.1 Templates.....	2
1.2 Travel Workflow	2
2. PROCEDURE FOR BOOKING TRAVEL.....	3
2.1 Applying for travel	3
2.2 Submitting the travel booking.....	3
2.3 Price variation from approval to booking	4
2.4 Cancellations and alterations	4
3. PROCEDURE FOR BOOKING & USING VEHICLES.....	4
3.1 Booking vehicle transport within Auckland	4
3.2 Booking a rental vehicle outside Auckland (but within New Zealand)	4
3.3 Booking a rental vehicle overseas.....	4
3.4 Returning a rental vehicle	5
3.5 Reporting a rental vehicle accident	5
3.6 Using a private motor vehicle	5
3.7 Taxi.....	5
4. MIXING PRIVATE TRAVEL WITH BUSINESS TRAVEL.....	5
5. CLAIMING TRAVEL EXPENSES	5
5.1 Applying for a cash advance (for overseas travel).....	5
5.2 Claiming general expenses	6
5.3 Claiming other reasonable expenses	6
5.4 Non-reimbursable expenses	6
6. ORGANISING TRAVEL INSURANCE	6
7. REPORTING AFTER A BUSINESS TRIP	7
8. APPENDICES.....	8
8.1 Appendix 1: Definitions	8
9. REFERENCE DOCUMENTS	8
9.1 Related Unitec Policies	8
9.2 Related Forms	8
10. DOCUMENT MANAGEMENT AND CONTROL DETAILS.....	9
10.1 Document Details	9
10.2 Amendment History	9

1. PURPOSE

The purpose of these procedures is to provide detail to ensure the Unitec Travel Policy is implemented and interpreted correctly.

This document must be read in conjunction with the Travel Policy and other relevant policies and, if there are any discrepancies, the Travel Policy information takes precedence.

1.1 Templates

Template	Use this to...
Application to Travel Form	Detail and apply for approval to travel

1.2 Travel Workflow

Stage	Who	What
Apply	Traveller	<ul style="list-style-type: none">• Completes the Application to Travel form• Documents the benefits and cost of the proposed travel• Details nature of travel discretionary or non-discretionary• Considers most economic and sustainable travel• Details funding sources for the proposed travel and associated costs• Reviews MFAT travel risk associated with the travel destination – attaches destination risk rating if high or extreme• Advises if there is any medical condition that could preclude travel• Ensures necessary vaccinations are up to date.
Approve	Manager (with delegated Financial Authority)	<ul style="list-style-type: none">• Assesses the appropriateness, cost, benefits and risks• Confirms budget available• Approves leave• Approves (or withholds approval of) travel and associated accommodation and costs• Escalates and recommends travel to Executive Dean and Chief Executive for “Do Not Travel” destinations• Ensures application is also supported and approved by associated Heads of Schools / Managers• Chief Executive pre-approval required for “Do Not Travel” destinations
Organise	Unitec Departmental Travel Coordinator	<ul style="list-style-type: none">• Ensures travel and associated expenses are documented correctly and approved (multiple approvals may be required)• Reviews application to ensure MFAT travel risk alerts have been included as appropriate• Books travel or requests booking with the Travel Management Company (TMC)• Organises insurance for high or extreme risk only which is subsequently sent to Procurement• Files approved application in the H:drive travel folder
	Travel Management Company (TMC)	<ul style="list-style-type: none">• Places bookings, issues itineraries and tickets• Checks visa and MFAT requirements• Invoices Unitec on a consolidated monthly invoice

Stage	Who	What
Travel	Traveller	<ul style="list-style-type: none">Keeps receipts for travel-related expenses while travelling
Reimburse/ Reconcile	Traveller	<ul style="list-style-type: none">Applies for staff claim reimbursement or submits a Cash Advance reconciliation or a P Card reconciliationProvides evidence of expenditure
	Approver	<ul style="list-style-type: none">Approves staff claim reimbursement or Cash Advance reconciliation in accordance with Unitec's Travel Policy and Procedures and other relevant policies
	Finance	<ul style="list-style-type: none">Checks travel expense claims reimbursements, PCard reconciliation and Cash Advance reconciliations against policies and proceduresReimburses the traveller for approved expenditure
Report	Traveller	<ul style="list-style-type: none">As applicable, provides a report on conference/meeting/ purpose of travel
Maintain records	Unitec Departmental / School Travel Coordinator	<ul style="list-style-type: none">Keeps travel records for seven years

2. PROCEDURE FOR BOOKING TRAVEL

2.1 Applying for travel

- The Traveller must complete an Application to Travel form in line with policy, i.e. all travel (totalling more than \$100) undertaken on behalf of Unitec including rental car hire and/or private car usage (e.g. mileage claims) and include:
 - a proposal of how the course/function/travel benefits Unitec business and/or learning priorities to validate the organisation's investment;
 - justification for the travel as opposed to the use of alternative attendance technologies
 - full details as to the reason for discretionary travel
 - details of any particular funding stream
 - indicative costing for airfares, accommodation and associated costs obtained from their departmental Travel Coordinator. As a guide, meal allowances are \$20 for breakfast, \$15 for lunch, \$35 for dinner and \$10 for incidentals per day. All amounts are GST inclusive.
 - all necessary approvals
 - a review of the MFAT website and any High or Extreme risk travel alerts for the travel destinations are printed and attached to travel application
<https://www.safetravel.govt.nz/>
- The Traveller then submits their application for travel and supporting documents to other stakeholders where endorsement or approval is required.
- For international travel, the Traveller must ensure they have a valid passport and appropriate vaccinations.

2.2 Submitting the travel booking

- Once approved, the Traveller submits the completed Application to Travel to their departmental Travel Coordinator who will:
 - check the Application to Travel form is completed correctly
 - ensure all necessary approvals are held
 - review the travel destinations and associated MFAT travel risk status
 - confirm the Traveller has the required travel documents
 - ensure the booking is made for the appropriate travel class (economy) and is cost effective
 - ensure the Traveller pays for all costs associated with private bookings, if any
 - The departmental Travel Coordinator will book the travel through the contracted Travel Management Company (TMC), unless:
 - for conferences, where the conference package is more cost effective, provide evidence that the TMC offer was unattractive
 - in a situation where the Traveller is already overseas and there is an emergency situation (e.g. where there is extreme risk to personal safety, a dangerous situation or extraordinary circumstances, which puts people and property at risk and necessitates prompt action) the Traveller will use best endeavours to maintain their safety.
-

2.3 Price variation from approval to booking

If the actual travel, accommodation and registration costs exceed the originally approved amount by 5% or more, the Traveller will need to seek re-approval from the initial approver/s. This will require evidence by way of an email from the original travel approvers which is then attached to the expense claim.

2.4 Cancellations and alterations

- Any cancellations and alterations must be made through the TMC that offer a 24/7 service.
 - Changes to the booking prior to the start of the trip must be approved by the Traveller's Manager, who will evaluate the reasons for the change and the cost to Unitec. If the change is made for private reasons the Manager may refuse the application and the cost of change is to be paid for by the Traveller.
 - The Traveller or departmental Travel Coordinator must obtain a cancellation number directly from the service provider (e.g. hotel, rental car company) and advise the TMC at the earliest possible time.
 - Unless there are genuinely unavoidable circumstances, Unitec may claim back any charges from the Traveller resulting from their not showing up for booked travel, accommodation and events.
-

3. PROCEDURE FOR BOOKING & USING VEHICLES

3.1 Booking vehicle transport within Auckland

- Book a Unitec pool vehicle through the Unitec Goods and Transport via the Nest Ask Us/Self Service/Book a vehicle
 - If the above options are unavailable or unsuitable, the Traveller must seek pre-approval to use a taxi or their own private vehicle;
 - Further, if the above options are not suitable, book a public rental vehicle via Unitec Goods and Transport department.
 - Note - all rental vehicles are automatically insured under Unitec's vehicle insurance policy.
-

3.2 Booking a rental vehicle outside Auckland (but within New Zealand)

- Book a rental vehicle through Unitec's Travel Management Company. Only small to medium rental vehicles up to 2.0 litres are approved for hire.
-

3.3 Booking a rental vehicle overseas

- Book a rental vehicle through Unitec's Travel Management Company.
 - Rental vehicles up to 2.0 litres may be hired where necessary.
 - The Travel Management Company will arrange insurance (including liability cover).
-

3.4 Returning a rental vehicle

- Return rental vehicles in a presentable condition and, where possible, fully refueled, to minimise charges relating to the return of the vehicle.
-

3.5 Reporting a rental vehicle accident

- Normal road code rules apply; advise the rental company as required.
 - Advise the Travel Management Company as soon as possible.
-

3.6 Using a private motor vehicle

- If you are using a private motor vehicle for Unitec business ensure the vehicle has a current warrant of fitness, registration, is road worthy and fully insured.
-

3.7 Taxi

If you are considering using a Taxi;

- In Auckland, consider a Unitec pool vehicle as first preference:
 - Book a Unitec pool vehicle through the Unitec Goods and Transport department via the Nest Ask Us/Self Service/Book a vehicle
 - If a Taxi is still the preferred option:
 - Use the Unitec preferred taxi operator, Blue Bubble Taxis which operates in all major New Zealand cities. Note that although there are other taxi firms under the Blue Bubble umbrella, these are more expensive. Taxi cards are available – contact Finance
 - Use Uber – evidence must be retained of the trip destination and an invoice (gst inclusive or exclusive) for any subsequent expense claim
-

4. MIXING PRIVATE TRAVEL WITH BUSINESS TRAVEL

- The Traveller must declare any commingled or associated private travel when making the Application to Travel, including whether accompanied by another person(s), as well as number of days for business travel and number of days for private travel
 - The Traveller's Manager must approve the private travel component and any associated leave
 - For Unitec staff, commingled private travel that has been declared and approved as described above will be included in the travel insurance cover Unitec has in place. Travel companions will not be insured via Unitec's corporate travel insurance
-

5. CLAIMING TRAVEL EXPENSES

5.1 Applying for a cash advance

- If required, apply for a cash advance and ensure it is in accordance with the Expense Claim and Travel Policy.
- Complete a cash advance reconciliation with all supporting documentation, plus attach proof of any remaining money having been deposited into Unitec's bank account to the PeopleSoft expense report within ten working days of your return to work.

5.2 Claiming general expenses

- Claims relating to business related expenses associated with the travel must include a copy of the Application to Travel form with the approval signatures of the authorising Manager(s)
- The claim must be submitted by the tenth working day upon returning from the business trip
- Enter all costs associated with a business trip on one expense claim and attach all relevant receipts which contain a description of the goods or services bought
 - Note: for further advice regarding reimbursement refer expense claim policy
- For private vehicle usage, details of each journey and the distance travelled must be itemised on the staff expense report. The refund will be based on the current IRD rate per km

5.3 Claiming other reasonable expenses

The Traveller must seek pre-approval from their Manager for reimbursement of:

- staying with family/friend at their private residence during a business trip (Unitec will refund the cost of a reasonable gift to the host at no more than \$25 per night)
- phone and internet costs, including a maximum of 10 minutes per day phone call/s to family
- compulsory visas and vaccinations
- reasonable gratuities in countries where there is a strong culture of tipping for service (e.g. USA, France)
- excess baggage costs for Unitec-owned property
- laundry charges (for business trips exceeding 6 or more consecutive nights)
- Note: if a daily allowance is being paid (per diem) most of the expenses under this section may not be claimed via expense claim as they will be deemed to be covered by the allowance. Per diem is normally for Unitec lecturers visiting overseas institutions and/or lecturing at overseas institutions.

5.4 Non-reimbursable expenses

The following expenses cannot be claimed:

- passport costs
- personal luggage or briefcases, toiletries or clothing
- travel or hotel club membership
- tips or gratuities except in countries where there is a strong tipping culture
- in-room movies or video rentals or other personal entertainment costs
- reimbursement for travelling between home and work
- illegal use of a motor vehicle, including fines for traffic and parking violations, plus towing fees
- mini-bar or alcoholic beverages or any sort including when consumed during meals
- home expenses, e.g. baby-sitter fees, lawn care, care of pet
- other, e.g. postage, pharmaceuticals, recreational activities, hairdressing services.

6. ORGANISING TRAVEL INSURANCE

- Unitec maintains travel insurance for business and intermingled personal staff travel, contractors and other nominated parties
 - The travel insurance provides cover for destinations outside of New Zealand only
 - Coverage is obtained when the travel coordinator files the approved application to travel in the designated folder on the H drive
 - Travel to or through areas listed as Do Not Travel on the MFAT website for safe travel is not covered by the Unitec Travel Insurance
 - The Traveller will be issued with information on Unitec's travel insurance by the departmental Travel Coordinator including how to contact the 24 hr call centre of the insurer for assistance
 - Any small claims must be raised after the Traveller's return using the Travel Insurance Claim Form on the Nest. Once the claim is accepted, the amount, less the excess, will be reimbursed.
-

7. REPORTING AFTER A BUSINESS TRIP

- The Traveller may be required to complete a course/travel report within four weeks of returning from the trip, using the Business Travel Report template.
- The Traveller submits the report to their Manager and any other approver or sponsor of their travel.
- A copy of the report is then forwarded to the departmental Travel Coordinator and filed with the travel documentation.

8. APPENDICES**8.1 Appendix 1: Definitions**

Term	Definition
Approver	Person with delegated authority (financial or otherwise) to approve travel or travel-related expenses Executive Dean - Academic or Executive Director who approves specific travel associated with Strategic alliances, marketing and research Chief Executive approves travel to High or Extreme risk destinations
Discretionary	Attendance or travel not compulsory Approval at Unitec's discretion to attend or travel
Non-discretionary	There is a strong expectation that Unitec will travel or attend in person
Travel	Travel includes both air and/or road
MBIE	Ministry of Business, Innovation and Employment
MFAT website	https://www.safetravel.govt.nz/
MFAT Travel Risk	MFAT assesses the risk that overseas destinations pose to travellers as: <ul style="list-style-type: none">• Exercise normal safety and security precautions• Exercise increased caution• Avoid non-essential travel• Do not travel• https://www.safetravel.govt.nz/
TMC	Travel Management Company
Nest	Unitec's intranet http://thenest.unitec.ac.nz/unitecintranet/index.cfm

9. REFERENCE DOCUMENTS**9.1 Related Unitec Policies**

- Travel Policy
- Expense Claim Policy
- P Card Policy
- Health and Safety Policy
- Sensitive Expenditure Policy

9.2 Related Forms

- Application to Travel Form
 - Travel Insurance Claim Form
 - Business Travel Report Template
-

10. DOCUMENT MANAGEMENT AND CONTROL DETAILS**10.1 Document Details**

Version:	1.9	Issue Date this Version:	August 2019
This Version Approved by:	Executive Director - Finance	Date of Approval:	August 2019
Document Owner:	Procurement Officer	Document Sponsor:	Executive Director - Finance
Date of Next Review:	August 2021		
Date first version issued:	2006	Original Approval Body:	Executive Leadership Team

10.2 Amendment History

Version	Issue Date	Reason for Revision	Approved by
1.8	25/02/2016	Health and Safety changes review & final	General Manager Procurement and Logistics
1.9	August 2019	Update of the term "travel" to mean air and/or car Inclusion of Uber as a transport option Minor process updates	ELT
