

TRAVEL PROCEDURES (DOMESTIC AND INTERNATIONAL)

Section	Finance
Contact	Chief Financial Officer
Last Review	May 2014
Next Review	May 2016
Effective Date	May 2014

Purpose:

The objective of this document is to ensure a clear and consistent understanding of procedures for University business travel, to maximise the University's ability to negotiate discounted rates with preferred suppliers and to improve the management of travel processes and expenses.

The procedures aim to clearly identify those expenses considered to be a legitimate and an appropriate part of University travel costs.

The procedures stipulate the way in which travel is to be arranged and the various methods by which travel expenses may be paid. The procedures provide for the payment of reasonable and necessary expenses of persons travelling for University approved purposes. It is the University's intention that when undertaking business travel on behalf of the University, the traveller will be afforded comfortable and good quality travel and accommodation. The University will not fund personal expenses incurred while travelling.

Scope:

This document applies to all Massey University (the "University") staff, contractors and students for all domestic and international travel and related expenses.

The policy provides a University standard that can only be exceeded in limited / exceptional circumstances, and only with the prior written approval of the appropriate staff of: Chief Procurement and Contracts Officer (CPCO) or the relevant Senior Leadership Team (SLT) member or the Vice-Chancellor.

Where the Head of Department/Institute/School or Director (HOD/I/S) wishes to vary the scope by introducing more stringent policies, they may do so provided Employment Agreement provisions are not affected. The AVC Strategy, Finance, IT and Commercial Operations (AVC SFIC) must be provided with details of such amended policies.

All staff must adhere to the policy irrespective of the source of funding for the travel.

These procedures must be read in-conjunction with the Travel Policy and other relevant policies and procedures such as the Leave Policy and Regulations.

Principles:

Accountability: The delegated budget centre manager (or a nominee acting on the behalf of a delegated budget centre manager) will be accountable for financial decisions that breach these procedures and the Travel Policy.

Cost Effective Payment or Staff Reimbursement: Staff members with University credit cards are to use them whenever possible or appropriate for incidental expenses incurred while travelling – instead of submitting staff

reimbursements. Where a University credit card has been used for meals and/or accommodation, no additional claims for an allowance through a staff reimbursement should be made.

Staff members without a University credit card must submit staff reimbursements through the FlexiPurchase system. Expenses must be authorised by staff member's delegated manager.

Where the University has borne all or part of the travel expenses for a staff member, that staff member may not declare the expenditure as a deduction for income tax purposes or for any personal reimbursement or claim from another organisation.

Health and Safety: Staff and their Managers are expected to consider staff and other related travellers safety at all times and make the appropriate decisions regarding travel.

Prudent Judgement: It is expected that prudent judgement is exercised in relation to travel related expenses and the extent of their cost effectiveness to the University. The cheapest alternatives available may not always be adopted, but cost should be one of the more important determinants in decision making in relation to travel arrangements and staff reimbursements.

Travel Planning and Appropriateness: The traveller should plan ahead in order to allow the University to take advantage of the best possible travel rates and/or discounts. Prior approval of travel is required.

Managers or their delegate should satisfy themselves that the travel is necessary to meet departmental and/or University objectives that the staff member concerned is the appropriate one to undertake the travel, and that the expenditure incurred is reasonable.

All overseas travel plans are to be documented and authorised in writing prior to travel taking place. Completion of the Travel Request Form (refer to the application form in the Leave Regulations) is mandatory for all international travel. The University will not accept responsibility for subsequent expenses if this process is not followed.

All University related travel must be booked through the University's Designated Travel Management Company (TMC). For international travel the traveller must take out the University's travel insurance. Travel purchased from other agencies will not be reimbursed by the University.

Use of Technology: Travellers should first consider if a telephone or video conference call could satisfy the objectives of an off-site meeting prior to making travel arrangements.

Vice-Chancellor Authority: The Vice-Chancellor acting through the appropriate SLT member may vary or suspend any of these regulations or procedures at any time to meet any unforeseen event. Such events include issues associated with the health and safety of the traveller, financial considerations, and any statutory or regulatory changes or guidelines. In all instances routine applications for international travel will not be unreasonably withheld.

Queries

Any questions, concerns or suggestions regarding these procedures should be emailed to procurement@massey.ac.nz or directed to the TMC as appropriate.

Index

Accommodation (hotel/motel)	4
Accommodation (private accommodation).....	4
Air Fares.....	4
Airline Lounge Membership	4
Airline Loyalty Schemes.....	4
Alcohol (liquor)	5
Allowances (domestic only).....	5
Annual Leave whilst on Overseas Travel.....	5
Cancellations.....	5
Class of Travel	5
Conferences and Events (internal and external).....	6
Credit Card Payments.....	6
Documentation	6
Emergency Contact Details.....	6
Entertainment Related Expenditure	7
Excess Baggage Charges.....	7
Expenses (staff reimbursements)	7
Gifts	7
Health and Safety.....	7
Hire of Private Aircraft.....	7
Inoculations	7
Insurance (including rental car insurance if appropriate).....	8
Laundry	8
Leave: Short, Long and Business Leave – General, Academic & Research Staff (International Only)	8
Lost Baggage	9
Meals.....	9
Personal Expenses	9
Reimbursement for Personal Car Usage	9
Receipts	10
Rental Cars	10
Spouses' Travel	10
Telephone/Mobile Calls.....	10
Tipping.....	10
Travel Agents	10
Travel Related Issues	11
Travel Risk Advisory	11
Traveller Profiles	11
Unused/Voided Airline Tickets	11
Use of University-Negotiated Hotel and Car Hire Rates for Personal Travel	11

Procedures

This document applies to all University staff, contractors and students for all domestic and international travel and related expenses.

Accommodation (hotel/motel)

- The TMC will be able to assist in finding suitable accommodation.
- In the first instance, staff must use the University's preferred domestic accommodation providers. If not possible, the Universities' Procurement Group (UPG) preferred domestic accommodation providers must be used.
- Accommodation outside of the University's preferred domestic accommodation providers may be used at times, up to the established maximum cap per night (for information in relation to the cap please contact TMC or the University Procurement and Contracts Group). The cheapest alternatives available may not always be adopted; but cost should be one of the more important determinants.
- Accommodation exceeding the established maximum cap per night requires the prior approval from the relevant SLT member and/or the University Procurement and Contracts Group.

Accommodation (private accommodation)

- Estimated reimbursements are agreed by line managers and the Leave and Ancillary Appointments Committee (LAAC) on a case by case or actual and reasonable basis and will be linked to the Leave Regulation rates.

Air Fares

- Air travel must be booked through the TMC for the lowest available fare except where there is high probability (i.e. more than a 75% chance), that a change to the flight would be necessary; a booking for a 'full flexi fare' can be booked. It is likely that this would only be necessary for changes in the return leg.
- Travellers should, where possible, provide departure and arrival time options so the TMC is able to achieve optimum results in terms of cost and convenience.
- For domestic travel within three hours driving distance of a University campus, air travel is not normally allowed. Any exemption to this requirement must be approved by the relevant SLT member.
- The most cost effective means to book travel is via the 'TMC Online travel booking application'. Bookings such as email or phone calls to the TMC incur a higher transaction fee.
- The University will pay for airfares booked and applicable departure and other taxes if travel has been appropriately authorized in advance of travel. When a staff member is away on business for an extended period, approval for flights home must be obtained from the HOD/I/S **before** travel arrangements are made.
- Changes to flights **must** be made via the TMC as they may have the ability to arrange fee waivers.

Airline Lounge Membership

- As a rule, staff are not entitled to casual entry or paid membership of airline lounges, e.g. Koru Club. Exceptions must be authorized by the relevant SLT member and reviewed annually.
- Renewals must be made at the corporate rate and will not be through private reimbursement.
- Memberships over two years and spouses' fees are not permitted and will not be paid for by the University.

Airline Loyalty Schemes

- Any individual travelling on University business must not influence the choice of airline that they travel with in order to accumulate travel benefits.
- Under the All-of-Government Contract airpoints are no longer available to staff.

Alcohol (liquor)

- The University will not normally reimburse alcohol or liquor – it is treated as a personal expense of the traveller. This includes staff travelling with other parties or peers.
- The only exception is where a staff member hosts visitors while away on business and such hosting is expected to be part of the business conducted. Full details of the event must be provided along with justification for the expense and all receipts. The expected cost should be included in the estimate provided at the time of travel authorisation.
- Refer to the Discretionary Expenditure and Gifts Policy for further guidance.

Allowances (domestic only)

- Allowances can only be claimed if it is difficult to obtain receipts or charge back costs to the University. The allowance to cover expenses (including meals) while travelling. Receipts are not required to be submitted. Refer to the Massey University Collective Employment Agreement (MUCEA) for applicable rates.
- In all other cases, expenses will be paid on an actual and reasonable basis.

Annual Leave whilst on Overseas Travel

- Applications are required for all planned international travel, in accordance with the Leave Regulations. University travel request forms are available for download on the University website.
- A printout of any annual leave already approved or being applied for during the period requested for overseas travel must be provided together with the application for overseas leave to the appropriate person with delegated authority to approve the overseas travel.
- Where annual leave is planned to be taken in conjunction with a University business trip then a contribution towards the costs of the airfare is required if the amount of leave to be taken is greater than the amount of time to be spent attending to University business (excluding the time taken for travel). As a rule the contribution is to be in proportion to the time spent on leave compared to the time spent on University business. Exceptions may be approved by the relevant SLT member.
- Expenses incurred during any period of annual leave taken in conjunction with a University business trip will be the personal responsibility of the traveller.

Cancellations

- When a trip is cancelled after the ticket has been issued, travellers can reuse airline tickets (apart from the cheapest level of fares, e.g., Air New Zealand's Green Light, Seat only or Seat and bag only fares) if airfare eligibility requirements are met (this must be verified by the TMC).
- A new application will be required in all cases for international travel.
- All unused tickets, coupons or vouchers relating to corporate travel **must** be returned to the budget centre's travel coordinator as they may be refunded to the University.
- Airline tickets are not transferable to another person.

Class of Travel

- The lowest available fare is the default for all travel.
- Economy class travel will be the standard class of travel. In exceptional circumstances upgraded travel may be permitted, subject to written prior approval from the Vice-Chancellor or their delegate.
- The benefits to the University of travelling premium economy or business class must clearly outweigh the costs involved.

- Flights of less than six hours will not be considered for upgrade.
- Staff can choose to redeem 'personal' airpoints to upgrade from a University purchased economy class fare without requiring approval. However, there should be no additional cost to the University and no contravention of the provisions set out in the Airline Loyalty Schemes clause in these procedures.

Conferences and Events (internal and external)

- Staff attending internal or external conferences and events within New Zealand require the **prior** approval of their Manager. Fees for internal events should be paid by internal transfer (journal). All other conferences and events require the approval of the relevant SLT member.
- All travel arrangements (i.e. flights, taxis) must be made via the University's TMC with the required purchase order number.
- Accommodation within New Zealand should be booked in accordance with the Accommodation clause in these procedures.
- For overseas accommodation, contact the TMC for their advice and/or recommendations.

Credit Card Payments

- Staff members with University credit cards should use them for payment of expenses while travelling.
- EFTPOS slips are not sufficient and itemised receipts are required showing the supplier's GST number (to allow the University to claim GST on its purchases). If not available, a "Credit Card – Missing Receipt Approval" form needs to be completed. This form can be obtained from the University's website.
- Use of University credit cards must be in accordance with the University's Credit Card Policy and Procedures.
- Airfares should not be charged to a University credit card unless there are exceptional or unforeseen circumstances.
- University credit cards are not to be used for the purchase of redeemable vouchers (e.g. traveller's cheques, petrol vouchers or similar negotiable vouchers) without the prior approval of their Manager and relevant SLT member.
- Refer to the Credit Card Policy and Procedures.

Documentation

- Staff travelling overseas must ensure that they are in possession of relevant documentation for travel including passport, visas and re-entry permits (where required).
- The University will reimburse the costs of documentation and Visas in cases where it has been necessary to incur charges specifically for the University business trip involved. This would normally exclude the cost of a passport and Visas associated with annual leave or other non-approved destinations which are considered to be a personal expense.

Emergency Contact Details

- Refer to the section below on Travel Risk Advisory.
- In the event of an emergency while travelling on University business:
 1. Contact the appropriate local emergency service.
 2. A collect call can be made from any location to Vero Global Assistance on +64 9 486 6868 (available 24 hours a day). Advise the traveller's name, location, that the travel relates to University business and the nature of the emergency.
 3. Contact the TMC (+64-6-350-5522). If outside New Zealand business hours the call will be automatically transferred to an emergency after-hours consultant who is available 24 hours a day.

Note: This information is also included on all travel itineraries issued by the TMC.

Entertainment Related Expenditure

- Refer to the Discretionary Expenditure and Gifts Policy for further guidance.

Excess Baggage Charges

- If excess baggage is a likely requirement of a business trip, the traveller must advise the TMC, as it is less expensive to pre-book excess baggage. Failure to do so may result in the application for reimbursement being declined.

Expenses (staff reimbursements)

- Staff members on University business trips who do not have a University credit card may claim expenses by staff reimbursement on return from the travel.
- For details in relation to staff reimbursements refer to Reimbursement of Expenses Policy.
- Failure to provide tax receipts may result in the application for reimbursement being declined.

Gifts

- The Alumni office and Wharerata have a range of University memorabilia that should be used for business-related gifts.
- Gifts given and received **must** comply with University's Discretionary Expenditure and Gifts Policy.

Health and Safety

- Refer to the University's Health and Safety Policy for advice.

Hire of Private Aircraft

- The hire of private aircraft for University business purposes is not allowed under any circumstances.

Inoculations

- Where inoculations for contagious diseases etc. are necessary for University business travel, any cost incurred will be reimbursed by the University.
- Tax invoices from registered medical practitioners will be reimbursed in accordance with the Reimbursement of Expenses Policy.
- Enquiries relating to specific countries' inoculation requirements should be directed to the TMC.

Insurance (including rental car insurance if appropriate)

- Travel insurance is provided by the University and must be taken by all individuals travelling overseas on University business.
- If approval to hire a rental vehicle has been received (refer to the clause entitled 'Rental Cars' in these procedures), the TMC will arrange rental car insurance.
- Details of the University's all-inclusive travel insurance scheme are available from the TMC website or from the Purchasing and Insurance Officer (procurement@massey.ac.nz).

- Insurance is charged to the traveller's budget centre.
- The University will pay for cover in respect of University related travel only.
- Cover can be made available, on application, for personal travel to family members at the same rates. The arrangements for taking out such cover will be the traveller's personal responsibility.

Laundry

- Costs of laundering (including dry cleaning) clothes while travelling overseas will only be paid if the travel period and/or conditions necessitate the use of laundry services.
- The cost of laundering clothes for staff while travelling domestically is not normally paid, except for exceptional circumstances, and requires the approval of a HOD/I/S or SLT member.

Leave: Short, Long and Business Leave – General, Academic & Research Staff (International Only)

- For all short, long and business leave a "per diem" rate is not automatically payable. The University reimburses expenses on an actual and reasonable basis. If an expense is not incurred then there can be no reimbursement. Similarly if expenses are excessive, the University may decline to reimburse such expense if it is unreasonable.
- The University expects staff to use their University credit cards for reasonable and actual expenses incurred.
- If a staff member does not have a University credit card or may face financial hardship, the staff member may apply for an advance payment of up to 90% of the limit with the prior approval by the Manager with the delegated authority.
- Upon returning to New Zealand staff, on producing receipts, may seek reimbursement of all actual and reasonable overseas expenses up to the approved limit from their Department/Institute/School Budget Centre.
- Reconciliation of all travel expenses must be completed within 30 days of returning to New Zealand.
- Wherever possible, staff must keep all receipts for all expenses incurred on overseas leave.
- Departments, Institutes, Schools and Budget Centres are responsible for the reconciliation and reimbursement for all Short and Long Leave expenses/costs for all academic and research staff as detailed in these Procedures.
- The LAAC will reimburse Long Leave expenses to the Department/Institute/School budget centre up to the limit approved for each staff member.
- Academic and Research Staff should apply to the LAAC if the proposed travel falls outside the scope of these regulations.
- Regardless of the source of funding, all staff are expected to use the funds made available for overseas travel in the most cost-effective manner.
- Refer to the Schedule in the Leave Regulations for guidance on reasonable actual costs
<http://www.massey.ac.nz/massey/staffroom/research/research-management-services/research-leave-laac.cfm>
- The Schedules are subject to ongoing review by LAAC and may, after consultation in accordance with the MUCEA 2005 (clause 5.3.2) and its successors, be amended at any time by the Vice-Chancellor on the recommendation of LAAC.

Lost Baggage

- In all instances, if baggage is lost or damaged while on University approved travel, the traveller must make an immediate insurance claim against the local airline or carrier at the airport of destination. The ultimate responsibility for retrieving and compensating lost baggage lies with the airline. The University will not reimburse travellers for personal items lost while travelling on business.
- Measures that can be taken to minimise baggage loss includes:
 - Always carry valuables (e.g. monies, jewellery, laptop computers, and cameras) and important documents and key personal effects in carry-on luggage.
 - Keep duplicated copies of important documents in at least two separate bags.

- Clearly label luggage with name, address and phone number.
 - Retain baggage claim receipts for checked-in luggage.
 - Carry electronic equipment as hand luggage where practical. If it is necessary to “check in” such equipment as a security requirement, insurance will cover any loss or damage to this equipment.
- Follow these procedures if bags are lost *en route*:
 - Obtain a lost luggage report form from an airline representative in the local baggage claim area.
 - Itemise the contents of the bags, including receipts, wherever possible.
 - Include a copy of the airline ticket and baggage claim stubs.
 - Keep a copy of the report, airline ticket and claim stubs.

Meals

- Meals should be charged back to the TMC or University credit cards. If not possible, actual and reasonable/modest costs (receipts) may be claimed on return from travel.
- The purpose of any hospitality expenditure is required. If others have been paid for, full details of hospitality recipients is also required. If the costs are likely to be significant, prior approval from a HOD/I/S or equivalent should be obtained.
- For domestic travel, further information regarding living and incidental allowances is available in MUCEA (clause 6.1) and in the FlexiPurchase system.

Personal Expenses

- The University will not reimburse personal expenses.
- Examples of personal expenses are in-house movies, alcohol, all mini-bar charges and charges for special or extra hotel facilities, such as gyms and hairdressers.
- Such expenses will be deducted from staff reimbursements unless there is specific prior authorisation from the Manager concerned and justification provided.

Reimbursement for Personal Car Usage

- Staff must use a University fleet vehicle if available.
- All work-related travel in University fleet vehicles or staff reimbursements relating to personal vehicle usage require the budget centre manager's prior approval.
- If a staff member is required to use a personal vehicle for travel while on University business, then reference must be made to the MUCEA or FlexiPurchase system for applicable rates.
- **Reimbursements are not to be claimed for travel to and from the traveller's usual place of work.**
- Refer also to the Vehicle Management Policy and Procedures.
- Employees are not to use their own vehicles unless the vehicle is insured, registered and warranted. Where this is the case, employees will be reimbursed for an insurance excess relating to repairs if damage is sustained to their personal vehicle whilst on University business or up to the value of the excess. This is on the proviso that the damage is reported immediately to the budget centre manager, a Police report is filed, and that signoff is obtained from the appropriate SLT member. It is the employee's responsibility to ensure that this clause is complied with, and the University will not pay for repairs or other costs where these requirements are not met.

Receipts

- Staff must obtain, where possible, tax receipted bills for all expenditure incurred. The receipt must clearly show the supplier's GST number to enable the University to reclaim the GST on the expense.

- Credit card slips and other receipts that do not give details of purchases are not considered to be an adequate means of justifying expenses.
- Where it is impossible to obtain receipts, especially for small amounts of expenditure, the staff member should state this when claiming reimbursement, provide a brief description where possible and certify that the amount claimed is legitimate and provide written approval from their Manager.

Rental Cars

- Staff should use a University fleet vehicle if available.
- Any intention to rent a vehicle must be approved prior to travel by the appropriate budget centre manager and booked through the TMC.
- If involved in an accident while driving a rental vehicle, travellers must immediately contact:
 - The rental company; and
 - The University Purchasing and Insurance Officer (Tel: +64 6 356 9099 or email procurement@massey.ac.nz)

Spouses' Travel

- The University will not generally pay for spouses or other family members accompanying the traveller.
- The Vice-Chancellor's prior written approval is required before any exception is made.
- A spouse or other individual may accompany the traveller on a University business trip at traveller's expense.

Telephone/Mobile Calls

- All business related phone calls, faxes, e-mail and related charges made by a staff member while away from the normal place of work will be reimbursed.
- Personal phone calls to home will be reimbursed provided that the frequency and duration of such calls is reasonable and not excessive.
- Travellers should minimise the cost of calls made from hotels through the use of calling cards and other charging and communication methods.
- University staff issued with a University mobile phone should use the University mobile, where it is cost effective to do so.
- University mobile to University mobile or landline phones should be used wherever possible.
- For overseas travel, please refer to the ITS Telecommunications Policy and Procedures.
- Overseas data usage rates are extremely expensive. Data usage should be limited and use of free Wi-Fi connections is recommended.

Tipping

- In locations where tipping is the usual practice such expenditure will be reimbursed where the amount is modest and reasonable.
- Tips given in restaurants should be included in the bill and thus officially recorded. If this is not practical, and the amount is not excessive, the University will reimburse but will require a record of the amount provided and to whom (e.g. name of restaurant).

Travel Agents

- All travel enquiries, including airfare and accommodation bookings, must be directed to the TMC. If travellers choose to use another agency for their travel arrangements they will not be eligible for reimbursement from the University.

Travel Related Issues

- The TMC strongly recommends that if, during the course travel, an unsatisfactory situation is experienced the matter should be taken up at that time with the supplier of the service in question.
- If the matter is unsatisfactorily resolved, or if the traveller needs to speak to the TMC on any other travel-related matter, contact the TMC (+64-6-350-5522). If outside New Zealand business hours the call will be automatically transferred to an emergency after-hours consultant who is available 24 hours a day.

Travel Risk Advisory (see also Emergency Contact Details)

- Prior to confirming the booking, travellers should view the MFAT Safe Travel website and/or contact the TMC, who will be able to advise on any potential issues or dangers prevalent in the destination country to assist in making an informed decision as to the safety or otherwise of the proposed itinerary.
- Prior to travel all travellers should view the MFAT Safe Travel website to obtain detailed information on the destination country(s).
- Specialist travel advisory advice and/or services are available (at a cost) via the TMC. Use of this service should be discussed in advance with the traveller's HoD/I/S or the University's Risk Management Office and SLT Member.
- Refer to the Travel Policy for the appropriate policy on travel to at risk destinations.
- The TMC has been instructed to reject any International travel to "Extreme Risk" destinations.
- If assistance, relating to either medical or personal security while overseas, is required, the traveller should contact the TMC (+64-6-350-5522) or the University Insurer's emergency number who will provide professional advice and/or assistance. Call collect from any location to Vero Global Assistance on +64 9 486 6868 (available 24 hours a day). Advise the traveller's name, location, that the travel relates to University business and the nature of the emergency.
- Refer to the Travel Policy for more details in relation to the policy on travel to at risk destinations.

Traveller Profiles

- Any individual expecting to travel on University business should submit a completed traveller profile form to the TMC to ensure that pertinent details and preferences are adhered to in the reservation process.
- The traveller is responsible for informing the TMC of any personal travel information changes.

Unused/Voided Airline Tickets

- Unused airline tickets or flight coupons must never be discarded or destroyed as these documents may have a cash value.
- Unused tickets should not be included in expense reimbursement claims or be sent to airlines.
- Travellers should notify the respective University travel administrator and the TMC and return any unused tickets to the TMC.

Use of University-Negotiated Hotel and Car Hire Rates for Personal Travel

- University-negotiated hotel and car hire rates may be used for personal/leisure travel, but must not be charged to the University under any circumstances.

Definitions:

MFAT Safe Travel website: New Zealand Ministry of Trade and Foreign Affairs Safe Travel website (www.safetravel.govt.nz)

Related procedures / documents:

[Discretionary Expenditure and Gifts Policy](#)

[Health & Safety Policies & Procedures](#)

[Insurance Policy](#)

[Leave Policy and Regulations](#)

[Reimbursement of Expenses Policy](#)

[Travel Policy](#)

[All-of-Government Air Travel Information for Massey University Staff](#)

Document Management Control:

Prepared by: Chief Financial Officer

Owned by: AVC Strategy, Finance, IT and Commercial Operations

Approved by: SLT 14/05/111

Date issued: May 2014

Last review: May 2014

Next review: May 2016