

Staff Travel Policy

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Approval History

Equality Analysis

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Committee Sign Off

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1. Introduction

1.1 Purpose

The purpose of this policy is to set out the procedure to be followed when making business travel arrangements to ensure that Travellers are safe, their well-being is considered and that the travel arrangements made represent value for money.

The University has a Duty of Care towards its Travellers. This policy sets out the action required by those travelling, and others, to ensure compliance with the Duty of Care requirements.

Adhering to this policy will ensure:

- Compliance with Duty of Care requirements
- Value for money. The value for money will be measured in terms of the total cost of the travel, staff time, reasonable adjustments and opportunity costs, which include the likelihood of travel arrangements changing which may impact on the ticket type purchased
- Compliance with the requirements of the HMRC rules and requirements for tax dispensation

Provided that the procedures set out within this policy are followed, staff will be covered by the University's Travel Insurance Policy and no additional tax or National Insurance contribution liability will arise. Staff will not need to report details within their tax returns.

It is brought to the Travellers attention that failure to follow the policy may result in staff not being covered by the Travel Insurance Policy and, where the policy has been deliberately circumvented, disciplinary action may be taken by the University.

1.2 Scope

This policy applies to:

- All travel in a professional capacity by employees of the University
- All travel by Post-Graduate Research (PGR) students of the University, for the purposes of their studies, as directed by their supervisors.
- All non-Surrey staff who are travelling for the University of Surrey (e.g. visitors and honorary fellows) where the travel is directly related to academic (learning and/or research) purposes organised or authorised by the University
- Student travel booked by the University such as Student Ambassadors (students who support the recruitment and schools liaison work as inspirational role models by attending events at local schools and colleges)

Financial Approvals and Flight Class restrictions under this policy do not apply to:

- Travel and subsistence costs that are being fully and directly reimbursed through another party e.g. invited speaker at a conference
- Individuals that are self-employed or work as contractors or consultants unless travelling on University of Surrey business at the request of the University

- Student travel booked by the individual student where the University is not reimbursing the travel costs

Where funding has been provided by an external and its rules are explicitly stated, those rules shall take precedence. In the absence of specific conditions the University's travel policy shall apply.

1.3 Equality Analysis and Medical Exemptions

The policy has been reviewed in accordance with the guidelines set out by University and to comply with the Public Sector Equality Duty of the Equality Act 2010

1.4 Definitions

Travellers – refers to all individuals referenced in section 1.2 Scope

Budget Holder- refers to the individual responsible for the budget against which travel is being booked and from whom financial approval shall be sought. The Traveller may also be the Budget Holder.

Line Manager – refers to the individual to whom the Traveller reports and will approve absence from office and relevant risk assessments.

In the event that the Budget Holder is the Traveller the next level of Agresso approver (£10,000) will provide financial approval.

Travel Management Company (TMC) – refers to the company providing a travel booking service. This includes but is not limited to flight tickets, hotel bookings and rail tickets.

1.5 Legislative Context

Health and Safety at Work Act

Corporate Manslaughter & Corporate Homicide Act (restricted to UK)

Data Protection Act 1998

European Working Time Directive

HMRC Rules

Equality Act 2010

1.6 Health and Safety Implications

The University has a Duty of Care for its staff under the Health and Safety Legislation which extends to travelling in connection with the business of the University of Surrey. Travellers shall comply with the instructions given in section 2.2.1 to fully understand the possible risks at their destination. Travellers should also complete the applicable risk assessment for travel and/or hazardous working.

2. Policy

All travel decisions should be made with the best interests of the University. This includes the decision to travel and the means and cost of the travel.

2.1 Principles

2.1.1 *Alternatives to Travel*

It must be deemed necessary for the employee to travel to a particular place, on a particular occasion, to perform the duties of their employment or their career development (including but not limited to training courses, placement meetings or conferences).

The University is committed to reducing its overall impact on the environment. As travel accounts for a significant proportion of the University's scope 3 carbon emissions, Travellers can contribute to reducing these emissions by considering alternatives to travel such as:

- Is the journey necessary? Could the meeting be effectively held in another way which would result in a reduced cost or environmental impact such as video/web/telephone conferencing?
- If travelling to the same meetings as colleagues, could transport be shared?

The Approver may request that the Traveller demonstrates they have considered all other options.

2.1.2 *Prior to Travel*

For all international travel, prior to formal booking, the Traveller should request Budget Holder / Line Manager Agreement to travel.

The TMC's on-line booking tool is the vehicle to formally request approval. Low cost air travel (e.g. Ryanair) and non-refundable hotel reservations are booked immediately on submission without further system authorization. It is therefore essential that prior approval is obtained before the reservation is completed.

When travelling on University business, the Traveller is required to book the most cost effective method of travel. Taking into consideration their schedule, the duration of travel, personal safety and wellbeing. Where necessary or appropriate, the carbon footprint or environmental impact may form part of the selection criteria.

Before any travel is booked the Traveller is responsible for:

- Demonstrating to the Budget Holder that the travel is essential if requested
- Confirming with the Budget Holder that sufficient budget is available
- Complying with any absence requirements for their department
- Completing all relevant risk assessments such as for High Risk travel destinations and, if applicable, a hazardous working risk assessment for the activities to be undertaken during the travel period
- Ensuring that all the Occupational Health requirements, such as inoculations or malaria prophylaxis, have been started or completed as necessary

- Between booking and commencing the travel, the Traveller is responsible for checking that the risks at the destination(s) have not varied. In the event that they have changed a further risk assessment should be undertaken using the tools provided. This should be in consultation with the Budget Holder, Line Manager and other appropriate staff to decide whether travel should proceed

Disabled travellers will be supported in their travel requirements in compliance with the [Disability Policy](#).

2.2 Procedures

2.2.1 Duty of Care-Risk Management and Insurance

As a responsible employer the University will take all reasonable measures to ensure their Travellers are safe.

Therefore, the University needs to make sure the Traveller and their Line Manager have taken every precaution to secure their safety before, during and after travel.

Adhering to this policy ensures that:

- The Traveller will be covered by the University's business Travel Insurance Policy, other than in exceptional circumstances, which will be handled on a case by case basis e.g. travel to a restricted country as outlined by the Foreign Office
- The University is aware of all travel plans and can keep the Traveller informed about unexpected levels of risk, to help ensure a sensible decision on whether to travel or not, can be made
- If an unforeseen event occurs overseas, the University will be better informed to locate and contact affected staff and offer support to enable Travellers to return home, or move to a safe location.

The Traveller should consult the current risk management tool provided by the TMC. This tool gives information about potential risks at a destination based on a variety of data sources.

Level 1	Risk Level Low
Level 2	Risk Level Moderate
Level 3	Risk Level Medium
Level 4	Risk Level High
Level 5	Risk Level Extreme

Where a destination is classed as a Risk Level 1 to 3, the Traveller is required to familiarise themselves with the recommendations and to follow the advice contained within the TMC risk management tool. The Traveller will confirm they have applied due diligence by completing a Duty of Care declaration regarding the risk assessment, as part of the travel approval process.

To ensure a Traveller's safety for high risk or extreme risk destinations, Risk Levels 4 and 5, a bespoke risk assessment should be completed with the support of Health and Safety, before booking. Please contact safety@surrey.ac.uk for support. Health and Safety will

assist the Traveller to complete a tailored risk assessment for their destination which needs to be signed off by the Traveller's manager and/or Head of School. Attempting to travel to a high risk or extreme risk destination without this risk assessment will not be approved. For some destinations additional insurance will be required. Please contact the insurance department for guidance. insurance@surrey.ac.uk

Where travel is booked well in advance of the departure date, or where the destination risk profile is volatile, the Traveller is required to re-visit the risk assessment and, in discussion with the Budget Holder and their Line Manager, agree if travel should proceed.

Travellers should also ensure that they are personally fit to travel. If you are aware of any information that might affect the insurance cover, for example if you have a pre-existing medical condition, the Traveller must be signed off as fit to travel by their doctor. The University trusts its employees to act in the best interests of themselves and the University at all times.

Domestic travel is currently seen as low risk, however travel booked by the TMC will automatically be incorporated into the travel risk management tool.

Travellers/Arrangers should complete all elements of the risk declaration prior to travel being approved.

As part of the approval process via the TMC, the Traveller will be requested to confirm the Duty of Care process has been followed which includes:

- The Traveller has permission to undertake work which involves travel away from your normal place of work for the duration of the travel period
- The Traveller has completed the necessary Duty of Care checks using the tools provided and understands all possible risks and how to mitigate them. For high or extreme risk destinations, a risk assessment has to be approved by the University and a copy is held by Health and Safety.
- The Traveller is fit to travel and to perform their duties during the travel period. The Travel Insurance Policy states that "If you have a pre-existing medical condition you must be signed off as fit to travel by your doctor". The Traveller will be required to confirm that they have complied with the travel insurance requirements stated:
- For Travel booked outside of the TMC, a pre-approval form incorporating the Duty of Care declaration must be completed and approved.

If the Traveller does not accurately declare this information it may result in them not being fully insured. In exceptional cases the Traveller may face disciplinary action.

If a departmental Arranger is used to fulfill the travel booking, it is the responsibility of the Traveller to confirm to the Arranger, that the Duty of Care elements have been completed. In the event that the Traveller does not satisfactorily advise the Arranger, he or she will indicate that the Duty of Care declaration is incomplete. Guidance for Arrangers is provided as an attachment to this policy.

Where a third party is booking and paying the full travel costs directly, the Traveller will be required to undertake the Duty of Care process by completing a pre-approval form.

2.2.2 Approved methods of booking travel

The University has a Preferred TMC Supplier. Using this TMC will help the Traveller achieve value for money measured by the standard set out in Section 1.1. It will also

allow the University to meet its Duty of Care requirements to the Traveller and will help to measure its carbon footprint levels for reporting purposes.

Bookings for all flights (domestic or international), accommodation (domestic or international), overseas rail travel, overseas car hire and overseas taxis etc. must be made using the TMC's on-line booking tool, or by contacting the booking team via phone or email.

Permitted exceptions to using the TMC include:

- Domestic Rail Travel (although the TMC should be used where possible)
- Conference hotel bookings where the rate is included as part of the conference booking, although the flights should still be booked via the TMC.

The on-line booking tool should be used for simple overseas and domestic flights, overseas and domestic hotel accommodation, and domestic rail.

Contacting the TMC booking team is recommended for complex itineraries where there are multiple destinations and/or (overseas) internal flights are required.

In an emergency the TMC may accept a travel booking without prior approval. The University will deal with these retrospectively on a case by case basis.

2.2.3 Travel with a dual purpose (University and Non-University business)

2.2.3.1 Travelling with a companion

The University recognises that Travellers visiting a business location may wish to be accompanied by a companion (spouse, partner, family member or friend). This is acceptable provided the companion does not travel at the University's expense. This applies to companions who are also University of Surrey employees where the trip is not directly related to their University business.

The companion's travel must be invoiced separately and paid for privately. This can be arranged by contacting the TMC, who will book the entire trip and ensure that the University is invoiced for only the approved employee's travel costs. The Traveller is required to pay the companion's travelling costs at the time of booking.

Booking travel with a personal element can be complicated. If a University Arranger is arranging the travel, the Traveller should be available to arrange payment for the personal element. If the Traveller is not available at the time of booking it will only be possible to book the business element of the travel.

Where a disabled staff member has a need for support staff to travel with them the funding for travel of support staff will come under **reasonable adjustments (Equality Act 2010)**. Each case will be judged on a case-by-case basis and only declined if the cost was deemed to be prohibitive.

Academic staff with primary or shared carer responsibility who wish to accept invitations to attend conferences to present papers or give poster presentation which involve overnight stays or travel overseas, which has not been previously possible

due to carer arrangements, can apply to the Travel Fellowship Fund to claim for carer costs in-line with the eligibility criteria outlined within the Fund.

2.2.3.2 *Combined business and personal travel*

Combined business and personal travel is acceptable where the cost of the business part of the travel is not increased as a result of the extension and where the Traveller meets all of the costs relating to the personal element e.g. whilst attending an overseas conference the trip may be extended to include a holiday, provided that the duration of the personal part of the trip does not exceed the business part.

Extensions which exceed the business element of travel must be discussed in advance with the Head of Financial Services and approved by the Line Manager.

Please refer to:

HMRC Guidance Notes on Employee Travel.

The University travel insurance will only apply to the business elements of the travel and personal travel insurance should be arranged to cover any personal elements of the trip.

2.3 Business Travel Rules

Travellers and Travel Approvers are required to select the most cost effective means of transport to meet the travel need. Value for money should be judged in consideration of the criteria set out in section 1.1 including:

- Business need as set out in section 2.2.1
- Total cost of the travel (flights, accommodation, transfers and subsistence),
- Duration of the travel
- Likelihood of travel requirements varying.
- Reasonableness of the travel conditions such that staff can perform their duties effectively

2.3.1 *Air Travel - Domestic and Overseas*

Travellers and Approvers are required to select the **lowest logical fare** that complies with this policy. Lowest logical fare is defined as *the lowest fare among flights that arrive or depart within a specific time window around the Travellers requested arrival or departure times, taking into consideration the time spent in transit and the number of stopovers*. Please see the FAQ section for specific examples.

Employees are required to travel in the most cost effective class available regardless of carrier. The Traveller may not select an airline primarily based on the use of personal loyalty cards.

A higher class of travel (i.e. Premium Economy or Business Class) may sometimes be justifiable, depending on, for example, the source of the funding for the travel. The class of travel and level of approval required under various conditions is given in the

table overleaf. The table specifies the cases in which the Budget Holder may approve and no further action is needed and the cases that are exceptions requiring approval by a member of the Executive Board.

Where the travel is externally sponsored, the Budget Holder is responsible for ensuring that the sponsor(s) contract with the University allows a class of travel above Economy, and that the sponsor will refund the full cost to the University directly. Such external funding must be within the University's [Ethical Conduct Policy](#). Where funding has been provided by an external **publically** funded body and the travel class rules in the contract conflict with the University's Travel Policy, whichever is the more economical will take precedence. In all cases, the use of extra funds to upgrade travel from Economy to a higher class must not reduce the ability of the Budget Holder to meet any other contractual obligations to the external sponsor.

Irrespective of whether the conditions below are met, the Budget Holder is never obliged to approve the higher class of travel where funds are not available or the extra cost negates the business need. It is the Traveller's responsibility to provide any additional information to the Approver to support a request for a higher class of travel.

Actions Required by Traveller

	Traveller is not required to provide additional information
	Traveller is required to provide a business justification which will be considered on its merits against the funds available and the applicable rules
	Exception to policy and must be approved by an Executive Board Member, Traveller is required to provide a business justification

Required Approval

	a) Flight in excess of 6 hours and need to work or sleep	b) Travelling with an external who is travelling in a higher class	c) Medical Exemption
Economy	Within policy	Within policy	Within policy
Premium Economy 100% Private Funding Source with full reimbursement	Budget Holder may approve at their discretion	Budget Holder may approve at their discretion	Budget Holder may approve at their discretion
Premium Economy Not 100% Private funded (e.g. UoS funded or Publically funded or partial Private/UoS funding etc.)	Budget Holder may approve at their discretion	EB member approval is required	Budget Holder may approve at their discretion
Business Class	EB Member to prior approve	EB Member to prior approve	EB Member to prior approve

Additional information to support the above approval table, where a higher class of travel may be approved, is provided below:

- a)** The duration of the flight is in excess of 6 hours and the length of the journey and its timing in relation to business meetings, presentations, etc. merit the need for sleep and/or work on the flight.
- b)** The Traveller is required by the Budget Holder, acting on behalf of the University, or other privately funded sponsoring organisations (i.e. not taxpayer) to travel with someone from another institution who is travelling in a higher class.
- c)** Where there are **medical grounds** for requiring alternative class of travel, line managers can refer travellers to Occupational Health to assist in the decision making process. The Budget Holder is expected to take reasonable steps to find funds for such requests in line with the University's Equality and Diversity Policies. Such medical grounds cannot be used however to force the Budget Holder to approve the higher class of travel where extra funds are not available, or the extra cost negates the business need. Where funds are not available the travel request may be declined.

Travellers may upgrade a flight once booked using their own loyalty points in accordance with the policies of the flight provider.

2.3.2 Accommodation, Hotels / B&Bs

Where an overnight stay is required, staff should book accommodation through the University TMC to help ensure value for money and to meet the University's Duty of Care requirements. Accommodation offered by the TMC has been evaluated to ensure it is compliant with safety requirements

Appropriate accommodation is defined as a three star hotel in the UK and the equivalent overseas. Serviced apartments available via the TMC are also considered acceptable. Occasionally four star or higher hotels may offer a lower price than a typical acceptable three star hotel, due to special pricing promotions or the need to increase occupancy rates at short notice. Where the Traveller can demonstrate that a hotel outside of the normal three star policy represents better value for money and the Budget holder or Line Manager approves, then it is acceptable to book. (see FAQ 1.8)

2.3.2.1 Conferences Hotels

Travellers attending conferences or other similar events may use the TMC to book the entire travel itinerary including their hotel (at the conference rate), flights and the conference fee. This requires the Traveller to call or email the TMC (and will incur a handling charge of £15 as at December 2016).

2.3.2.2 AirBnB

The University does not approve the use of AirBnB as the University cannot guarantee meeting its Duty of Care requirements to ensure the Traveller's safety in this type of accommodation. Please see FAQ Section 2 for further details.

2.4 Rail

Where appropriate and practicable, rail travel should be booked using the TMC. To obtain value for money on rail journeys the University expect Travellers to use standard class travel unless:

- a) The cost of First Class is no higher than Standard Class
- b) The member of staff is required by the University or other sponsoring organisation to travel with someone from another institution who is not travelling in Standard Class or equivalent.
- c) The funding sponsor for the work being undertaken allows this class of travel and will refund the full cost without the requirement of subsidy from any other aspect of the project. The payments must comply with the University's Ethical Conduct Policy..

Where the travel is externally sponsored, the Budget Holder is responsible for ensuring that the sponsor(s) contract with the University allows higher class travel and that the sponsor will refund the full cost to the University directly. Such external funding shall be within the University's [Ethical Conduct Policy](#). Where funding has been provided by an external **publicly** funded body and the rules in the contract conflict with the University's Travel Policy, whichever is the more economical will take precedence. In all cases, the use of extra funds to upgrade travel from Standard to a higher class must not reduce the ability of the Budget Holder to meet any other contractual obligations to the external sponsor.

It is the Traveller's responsibility to provide any additional information to the Approver to support a request for a higher class of travel.

Irrespective of whether the conditions above are met, the Budget Holder is never obliged to approve the higher class of travel where funds are not available or the extra cost negates the business need.

International rail travel (including Eurostar) should always be booked using the TMC to ensure that the travel risk management tool is updated.

Rail travel within the United Kingdom is considered a low risk means of travel but where practical should be booked using the TMC to support Duty of Care.

Personal Rail Cards may be used. Please see FAQ Section 1 for details. The University does not fund the purchase of rail cards.

2.5 Transfers between Airport/Railway station and Accommodation / Venue

Where possible and practicable, public transport should be utilised taking into consideration cost, time and personal safety.

Where appropriate, the TMC should be consulted as to the most practical and safe options available for overseas onwards transfers, and where possible, these should be pre-booked as part of the travel itinerary.

2.6 Taxis

Overseas and Domestic

Where no other appropriate form of transport is available or suitable (e.g. late night travel, no practical public transport links or, risk to personal safety) the University will reimburse the cost of taxi fares incurred whilst travelling on University business via Agresso Expenses. Where possible overseas taxi's should be pre-booked with the TMC

Domestic Taxis

The use of taxis by members of staff, where the journey commences at the University, Surrey Sports Park or the Research Park, during business hours, is restricted to exceptional circumstances such as a reasonable adjustment to comply with the Equality Act. In order to justify a taxi journey, the distance of the journey one way must be a minimum of 3 miles and there must be a verifiable business need for travel by taxi. In instances where it is necessary to transport equipment between sites, the use of pool vehicles (Enterprise Car Share tool (Previously WE car) should be the primary option.

Booking of taxis should be made through approved suppliers. Please refer to the Business Travel webpages <https://surreynet.surrey.ac.uk/staff-services/business-travel> Or the Approved Suppliers List for current providers <https://surreynet.surrey.ac.uk/staff-services/procurement/find-supplier>

2.7 Airport parking

The cost of airport parking should be considered against the costs and practicality of public transport and/or taxis and the cheaper options selected. The Traveler should also give

consideration to their wellbeing and those of others. The University would not advise that Travellers drive immediately after a night long-haul flight.

2.8 Air miles or other Loyalty Schemes

Air Miles are available to both the University and the individual. Other providers also offer loyalty schemes that the Traveller may join. Provided there is no cost impact to the University, the Traveller's private loyalty scheme points may be used to upgrade flights at the individual's convenience. The individual may also personally purchase other benefits such as air lounge passes, etc. The loyalty card may not be used as the basis to select an airline or accommodation.

Corporate air miles are collected by the University and will be allocated for the benefit of the University e.g. to allow Postgraduate Students to attend conferences that they would not otherwise be able to afford. Please contact the Procurement Department for information at Procurement@surrey.ac.uk.

2.9 Other Travel Management Services

2.9.1 Visas

The TMC can provide advice as to the appropriate visa required by the Traveller. The TMC should be used in the first instance to source the visa, which should be charged to the project code as part of the travel costs.

2.9.2 Travel Money

Money can be ordered on-line from the Post Office and collected on campus from the in-house Post Office counter.

2.9.3 Inoculations

The Traveller, as part of their travel risk assessment, should establish what vaccinations are required for their destination using <http://www.fitfortravel.nhs.uk>. Occupational Health may be consulted and vaccinations are also available through the Robens Centre <http://www.rcohs.com>

Travellers may also use their own medical practitioner/GP if preferred.

Please note inoculations may take up to 6 weeks to complete.

2.10 Vehicles

Overseas - where required, overseas hire cars should be booked using the TMC

Domestic - for local journeys of less than 4 hours, staff can reserve a University car using the Enterprise Car Share tool (Previously WE car).

[Enterprise Car Share \(WE Car\)](#)

For longer journeys a hire car should be booked using the University's nominated supplier. Fuel costs will be reimbursed against a receipt using the expense process

[Vehicle Day Hire](#)

Staff using their own vehicles must have appropriate insurance and have completed the Driving at Work Policy requirements.

[Driving At Work Policy](#)

2.11 University Equipment

Any equipment such as laptops, mobile devices and phones being taken on a business trip must comply with the requirements of the [Data Protection Policy](#), [Information Security Policy](#) and [using your own devices Policy](#).

3.0. Governance

3.1 Responsibility

The Chief Operating Officer has overall responsibility for this policy. Operational responsibility may be delegated to support compliance management.

The Dean(s) of Faculty(s) or Heads of Support Function are responsible for overseeing the effective enforcement of the policy with the support of the Line Managers.

The University will work with the TMC to develop and evolve a suite of Management Information Reports that will help support both compliance, and driving Value for Money.

Any questions regarding this policy should be addressed, in the first instance, to the Finance Support Team by emailing financesupport@surrey.ac.uk or calling X3400

Line Managers should resolve out of policy travel issues with the Traveller, and should refer to Human Resources in the event of significant or frequent breach of policy.

3.2 Supporting documentation

FAQ Guidance Notes

Frequently Asked Questions

(For Expenses please refer to the University's Expense Policy)

Section 1: Approvals

1.1 Who approves my travel?

Your line manager approves travel away from your normal place of work and any Duty of Care risk assessments. This is in accordance with your departmental processes. The Budget Holder approves the costs against their budget. If you are the Budget Holder the next financial approval level in Agresso will approve purchase of your travel.

1.2 I am booking my flights over the weekend, who will approve? If I cannot get approval can I book directly and reclaim through expenses?

The approval will follow the normal work flow, the University does not expect staff to monitor their emails in their personal time but to action any requests at the earliest available working opportunity. Travellers should allow for this turnaround time when planning their travel.

1.3 What is a lowest logical fare, shown as reference fare, on the TMC booking tool?

A lowest logical fare is the cheapest of the available flights that meet your travel requirements in terms of required arrival and departure times, time in transit and other factors such as proposed additional subsistence costs etc. When selecting your flights the cheapest flight may result in an extended travelling period. For example, it is possible to fly from Edinburgh to Cardiff via Berlin for £10 taking 20 hours but a direct flight may cost £80 and take 1 hour. The total costs, as measured in physical cost and time cost, would recommend the direct flight rather than the indirect.

1.4 I need to make an emergency booking due to a family emergency (e.g. death or serious illness)

The TMC will accept an emergency booking but retrospective approval will be sought. Travellers need to be aware that the Travel Insurance Policy will not cover the costs of travel if the circumstances may have been foreseen such as a family member with a terminal condition. Each case will be dealt with by Finance and Insurance on its merits.

1.5 I need to make a booking via the Travel Agent which is time limited and **it is the budget for which I am responsible for**, but due to unforeseen circumstances internal approval has not been given. Can the TMC book the flight and approval be provided retrospectively?

In exceptional circumstances the TMC will make a booking without the approval however it is the Traveller's responsibility to provide a business justification (including but not limited to, a significant cost saving, immediate need to travel) and for approval to be provided to the TMC as soon as possible. If this emergency protocol is used for convenience or to avoid the approval process this will not be complying with policy.

1.6 Can a personal Rail Card be used?

Yes if you have a Rail Card and are willing to use it when travelling on behalf of the University please enter the details in your Personal Profile.

Where the Rail Card is a 2 for 1 i.e. a multiple ticket discount and the other Traveller(s) are not University staff, the companion travel requirements set out in 2.2.3.1 will apply. Should the Rail Card create a discount such that both travellers are travelling for less than the standard return the University will fully fund the travel. If additional costs are incurred the University will fund up to the standard fare for the University traveller and the individual will be required to pay the difference.

1.7 I am booking for an external visitor to the University, do they fall under the policy?

Where the University is funding the traveller then generally the traveller will fall under the policy. There is a degree of discretion depending on the circumstances and who the traveller is. Please speak to your Line Manager.

1.8 Can I book a higher class of Accommodation than 3 star?

Yes this is permissible in the following circumstances,

- You are staying in a higher risk destination and will be mitigating the risk by staying in a hotel with demonstrable higher guest safety (location / security)
- You are able to demonstrate that the higher class of accommodation is value for money i.e. no more expensive than the recommended 3*
- You are staying with external guests who require you to be in the same location

Section 2: Use of Travel Agent

2.1 Can I book travel without using the Travel Agency?

If a **significant** cost saving can be realised by booking directly with an airline due to promotional prices not being available via the Global Distribution System (GDS) that the TMC uses for air fares, it may be acceptable to book directly with the airline. However, before any flights are booked the TMC's price match promise should be utilised and you must contact the TMC before booking outside of policy.

If it is verified that the TMC cannot provide an appropriate itinerary (by TMC providing, the closest match itinerary and pricing, via the price promise, as an attachment to the pre-approval form), then the Traveller/Arranger should ensure a pre-approval form has been approved by the Budget Holder; a copy has been sent to PreApproval@surrey.ac.uk and the travel purchased using a University PCard. If the Traveller or Arranger requires additional support they should contact Finance Support for guidance on other suitable purchasing channels.

Please note that, in order for the University to fulfil its Duty of Care for any overseas travel booked outside the TMC, the travel itinerary must be provided to the TMC. This allows for the travel risk management tool to be maintained. This travel risk management tool is provided free of charge to bookings made via the TMC but incurs an administrative fee for non TMC travel. The University will be charged the off line booking fee (up to £11.95 at time of writing) plus an admin fee (of £10.00 per itinerary at time of writing).

Price Promise

You should also be mindful of the time taken to research other options. This is what we retain the TMC to do on our behalf, and spending time researching is generally not cost effective.

2.2 If I can find a cheaper flight on Sky Scanner or Expedia can I book it?

See FAQ 2.1. Generally flight prices are dynamic and tools such as Sky Scanner do not usually show currently available flights, only what has been available; therefore when you go to book, you may not be able to find the same flight at the preferential cost. The TMC has access to the same information as Expedia and if a flight is available on Expedia the TMC should also be able to find it. Use the price match available through the TMC. In some cases the TMC will not be able to match the price e.g. where airlines release flights through their own portal exclusively in which case a purchase card should be used and the Duty of Care process documented.

2.3 Do I need to complete a pre-approval form?

A pre-approval form is only required where travel is being booked outside of the TMC.

2.4 Do I need a Visa?

The TMC will be able to advise you if a Visa is required. They can help arrange a Visa for your trip.

2.5 Do I need to complete a Personal Profile?

Personal Profiles collect basic information about you, which is used to help speed up your bookings. The TMC uses the information to pre-populate your booking with information such as your full name, date of birth, passport number, seat or meal preferences, but it is possible to provide this information each time you book. As a minimum the Personal profile will need your name (as per your passport) email and date of birth. A mobile number should be provided to facilitate contact with you during travel.

2.6 I am attending a conference and the organiser is using an expensive hotel which is out of policy; can I stay in that conference hotel?

Yes, provided the Budget Holder is willing to accept the costs and there are no suitable alternatives nearby that are within policy limits.

2.7 I want to book my own travel

You can book your own travel using the on-line booking tool.

2.8 I don't want to book my own travel

If your department has a nominated Travel Arranger and they are willing to support your travel requirements you can nominate another individual to undertake all travel booking on your behalf. Please note this individual will be able to see personal information in your traveller Personal Profile such as your full name and date of birth. This will not remove your responsibility to undertake the Duty of Care requirements.

2.9 Can I use my own personal credit/debit card to book travel?

See FAQ 2.1. The University recommends that the TMC should be used as the main booking mechanism. Where the TMC is unable to supply an appropriate travel itinerary please contact Finance Support who can direct you to your departmental purchasing card holder to make the booking payment on your behalf. For domestic rail travel you are encouraged to use the TMC, but where this is not possible, you can book direct using ideally a University purchasing card for payment, or a personal credit card if not practical. Please note a pre-approval form must be signed off by the

Budget Holder before any booking can be made for overseas or domestic travel over £250 (including expenses) where the TMC is not used.

2.10 Can I use Air BnB?

AirBnB is not to be used by staff travelling on University business as the University cannot ensure your safety in this type of accommodation. It is unknown if the party offering the accommodation holds relevant insurances and the accommodation may not have been assessed for fire safety, building or wiring codes or, have appropriate fire alarms, exits etc. AirBnB are not liable in the event of death or personal injury.

2.11 Can I use Airport Parking?

Airport parking is acceptable provided that it will not cost more than other methods of travel to the airport. Please note it is not recommended that staff drive immediately after a long-haul flight.

2.12 Can I get a Taxi to the Airport?

You are required to take the most economical method of transport to the airport. Factors to be considered are travel and arrival times, amount of luggage or other equipment being transported and personal safety.

2.13 Can I book an Airport Lounge Pass?

The University will not fund airport lounge passes, although travellers can sometimes use their business miles to purchase access, if you do not hold a high enough frequent flyer card.

2.14 Can I collect Air Miles?

Yes you are able to collect air miles for yourself which you may use to upgrade your flights and accommodation. However, the loyalty scheme must not be used to justify choice of an airline.

2.15 Can my partner come with me?

Yes, but the University will only pay for the University employee costs.

2.16 Can I extend my trip?

Yes, provided that you have your manager's approval to be absent and you pay any additional costs such a hotel, meals or additional travel yourself. Please note you are not insured by the University once the business element of the trip has been completed so please arrange private insurance. See also 2.2.3.2 combined business and personal travel.

2.17 Can I buy domestic rail tickets from an alternative supplier?

This is permitted if the train has been cancelled or significantly delayed and the traveller needs to purchase another ticket

2.18 Can I use my Railcard?

Yes, if you are willing to use your railcard for business travel. If you have a specific rail card such as a 2 for one you may book both tickets provided that you pay the difference between the single fare and the discounted fares yourself. If you manage to get both tickets cheaper than a standard return fare the University will pay all the costs. The University is unable to fund the purchase of rail cards.

2.19 Can I travel First Class on a train?

Where the First Class ticket is no more expensive than the Standard Class it is permissible to book First Class. See section 2.4 of this policy regarding rail travel.

2.20 The train is full and there are no seats available in Standard Class. Can I pay for an upgrade?

Generally no, as seats can often be pre-booked. Depending on your business need to work and the length of a journey it may be acceptable to purchase an upgrade. Approval will be dealt with retrospectively and may be withheld if a business justification cannot be provided.

Section 3: Health and Personal Fitness to Travel

3.1 How do I find out what inoculations are needed for my destination?

*This information is found on the NHS website:
<http://www.fitfortravel.nhs.uk/destinations.aspx>*

It is also available under natural and health risk in the risk information tool on the IAT travel portal.

3.2 I am pregnant and do not wish to declare this

Provided you have permission to travel from your care provider (Midwife or Consultant) there is no need to declare your condition. Please note different airlines have different periods when travelling whilst pregnant is not recommended so please confirm with the airline before booking.

3.3 I needed to travel to Africa during the Ebola outbreak what does the University offer to make this as safe as possible?

Before travelling to any destination you are expected to inform yourself about possible risks and ensure you have the correct inoculations. Where the information tools, Amadeus Mobile Messenger or Travel Guard, indicate that there is a high risk (level 4 or 5) please contact the Health and Safety department for a bespoke risk assessment which needs to be signed off by the relevant manager (nominally your line manager and Head of School/Department)..

3.4 Who do I call if I am sick when I am overseas?

Please contact the Insurance Company. The contact number is given on the cover note.

3.5 Who do I call if I am mugged when I am overseas?

Please call the relevant authorities in your destination such as the police or medical services should you require immediate attention but also contact the Insurance Company.

3.6 Who do I call if I miss my flight/train/bus or the hotel has does not have my booking?

You should contact the Travel Agent for support.

3.7 Am I insured when I travel overseas on University Business?

Yes, but you do need to complete the Duty of Care elements of the travel booking process before travel and you must not withhold pertinent information. See Insurance Website

3.8 What is a pre-existing medical condition?

A pre-existing medical condition is either an illness that you have had advice for, symptoms of or treatments for or disability i.e. there is physical or mental impairment, and the impairment has a substantial and long-term adverse effect on his or her ability to carry out normal day-to-day activities'. Common medical conditions include but are not limited to heart conditions (including high blood pressure), cancer, breathing conditions including asthma, joint and bone conditions, diabetes and gastrointestinal conditions.

3.9 Do I need to declare a pre-existing medical condition?

For ill health pre-existing conditions, if you have discussed your pre-existing medical condition with your Doctor/Consultant and they are in agreement that you are fit to travel no information needs to be provided. In the event of an insurance claim the Traveller will be asked to demonstrate that this due diligence has been completed.

For disability please contact Occupational Health for support if necessary

If you have any questions please contact the University's Insurance department to confirm that you are covered under our existing policy.

3.10 I have a disability which requires additional support when I travel how is this supported?

The Traveller should contact the TMC and make them aware of any special requirements. The TMC will then provide suitable transport and accommodation arrangements for approval.

Relevant Links

Health and Safety

Travel insurance

Ethical Conduct Policy

Disability Policy

Data Protection Policy

Information Security Policy

Using your own devices policy

Occupational Health