

## APPENDIX B. TRAVEL GUIDELINES

### B.1. OVERVIEW

#### **Before the trip**

- Establish the need to travel.
- Prepare a detailed plan.
- Obtain relevant approvals.
- Make bookings.

#### **During the Trip**

- Keep a travel diary recording times, dates and places of travel.
- Keep receipts of meals and business expenses where possible.

#### **After the trip**

- Carry out the necessary acquittals, reconciliations and reimbursements of expenses within two weeks of completing the trip.
- Complete reporting requirements.

### B.2. BOOKING AIR TRAVEL

No overseas air travel is to be undertaken by Government officers unless it is demonstrated that such a function could not be undertaken by existing Western Australian Government overseas offices.

Attendance at interstate and overseas conferences and courses is not to be approved unless it is essential to the efficient performance of an officer's functions and required to meet the agency's outcomes. The use of Skype and Teleconferencing should be considered where cost effective as an alternative to air travel.

Unless in a student travel group, no more than two employees from the same business unit or school would normally be approved to travel on the same interstate or overseas trip.

In accordance with the Premier's Circular 2014/02 guidelines on official air travel, employees are required to make the most economical travel arrangements possible. All travel must be economy class using the best fare of the day, except for the Director General and other authorised officers. Where an officer is required to travel with the Director General, that officer is allowed to travel with the Director General in business class.

When choosing the best fare of the day, bear in mind that a discount airfare might not be the most economical airfare available. Check each booking individually, bearing in mind the conditions of the fare and the needs of the traveller (e.g. flexibility).

Unused flight credits are public funds and must be utilised for official travel where possible. The Travel Booking Officer uses all available flight credits when booking a flight.

## B.2.1. PROCESS FOR BOOKING AIR TRAVEL

Business unit managers and principals may appoint more than one travel booking officer or might choose to carry out the booking themselves.

The Travel Booking Officer:

- checks that the original *Travel Application Form* is complete and all relevant approval signatures have been obtained;
- makes a booking or confirm a tentative booking;
- after the booking is made, forwards a copy of the approved *Travel Application Form* (regardless of whether the travel is funded by the Department/school) to the Financial Reporting Officer, Financial Accounting and Reporting; and
- retains the original *Travel Application Form*.

### B.2.1.1. TENTATIVE BOOKINGS

A tentative booking is an unpaid booking. The Travel Booking Officer can make a tentative booking prior to approval. However, the travel provider needs to be contacted before the payment deadline otherwise the booking may be automatically cancelled by the airline. It needs to be mentioned that when making a domestic airline booking via the online booking tool, the travel booker has the option to hold a booking. However, when using the hold function it will not hold the seat nor the price but only the shell of the booking. Once the travel booker is ready to confirm the booking, the booking can be resumed but prices will be reloaded to the current prices.

The purchase card number can be quoted at the time of making a tentative booking, and travel provider is advised not to issue the tickets unless it has been authorised by the Travel Booking Officer. However, it is recommended that the purchase card number be withheld until the Travel Application Form has been duly approved by all relevant authorising officers.

### B.2.1.2. BOOKING CONFIRMATION AND PAYMENT

The authority for travel provider to issue the tickets is at the confirmation of the booking by the Travel Booking Officer.

The Travel Booking Officer is responsible for confirming bookings and authorising the issuing of tickets by advising travel provider of the purchase card number to be charged, if it has not been previously quoted.

As soon as a booking is confirmed, the travel provider will charge the cost of the airline ticket to the purchase card. The Travel Booking Officer is responsible for checking that the amount charged is correct.

All Department cost centre bookings with the travel provider are paid by an approved purchase card. For schools, a tax invoice can be issued by the travel provider if a purchase card is not available.

In conjunction with the traveller, the Travel Booking Officer is responsible for organising the payment and issuing/collection of tickets with the travel agent.

### B.2.2. AIR TRAVEL BOOKINGS

The most cost-effective and efficient way to book and manage travel arrangements is through the travel provider's Online Booking Tool (OBT). Using the online tool rather than speaking directly to the booking service's staff can reduce transaction costs significantly. Complimentary Online Booking Training can be also arranged by contacting the travel provider

The Travel Booking Officer needs to quote the Department Booking Number when making the booking through the Government's contracted travel provider or Regional Travel Agent.

To apply for a new Department Booking Number or if the Travel Booking Officer has forgotten the Booking Number, contact the Financial Reporting Officer in Financial Accounting and Reporting (see Appendix H for the Notification Form). School teachers accompanying students on an excursion can also book their travel with the same agent even if the cost of the travel for the teachers is not privately funded.

Further information on contracting arrangements relating to school excursions can be found on the Department's buying website: [Buying website - Contracting Arrangements](#).

It is advisable to check contract information relating to Travel Providers and Vehicle Rental Providers on the [Buying website](#).

A common use agreement is available for international travel bookings. However, it is not mandatory to use this contract for international travel bookings. Other travel agents may be used in accordance with the State Supply Commission procurement policy.

Also see the Travel Guidelines B.9 on Overseas Travel and Appendix F: International Travel Checklist.

### B.3. SPONSORED TRAVEL BY A THIRD PARTY ORGANISATION

Sponsored travel is any work related travel expense that has been fully or partially paid directly by a third party or for which you have been reimbursed directly by a third party.

Sponsored travel is classified as a gift if given personally to an employee for themselves, spouse or dependents for personal/recreation purposes. In this situation the employee is to use the same procedures as gifts for declaration and approval (*see the Gifts Benefits and Hospitality Policy*).

Examples of travel expenses can include, but are not limited to travel, accommodation, meals and transport.

In the course of work, officers may receive an offer for interstate or international sponsored travel for an event or another purpose. In deciding whether to accept or decline the offer officers are required to:

- Consider if accepting it would place them in a position of actual, perceived or potential conflict of interest,
- Ensure that there is legitimate business benefit from accepting the offer; and

- If the offer is funded by a Third Party organisation complete Appendix L (reporting of Sponsored Travel by a Third Party Organisation).

#### B.5. AIR TRAVEL REPORTING

A quarterly summary report of overseas travel undertaken by all staff is prepared by Financial Accounting and Reporting with the information contained in the *Travel Reporting Declaration* (Appendix D) submitted by employees. This summary is approved by the Director General prior to submission to the Minister's Office for publishing and tabling in Parliament.

A quarterly summary report of interstate travel is prepared by Financial Accounting and Reporting and submitted to the Director General.

#### B.6. TRAVEL INSURANCE

Insurance cover is automatically provided for all employees travelling on approved official business for the Department, irrespective of the source of funds.

Cover for employees on approved travel includes periods during the travel where the person is not solely engaged on Department business provided this does not exceed 2 days during any period of leave taken during the travel. If the employee takes leave for more than 2 days then the employee will have to arrange their own personal travel cover for the leave period (including the 2 day period allowed).

Cover commences from the place of departure and continues on a full time 24 hours a day basis until return from travel.

From 1 July 2019, insurance coverage is also provided for students and approved parent supervisors on approved excursions controlled by the school involving interstate and international travel. Non-employees other than approved parent supervisors, undertaking a school tour/excursion are not covered by the Department's insurance policy and should arrange their own private insurance cover for such a tour/excursion.

The insurance cover does not include private arrangements and leave that is not associated with the school excursion.

More information on student insurance can be obtained from the following Ikon pages:

- [Manage insurance cover for school trips](#) and
- [Account for student air travel insurance](#) (to record refunds, collections and remittances to Central Office).

More information on travel cover for employees, students, parents and volunteers can be obtained from [RiskCover's Travel Certificate of Currency](#).

### B.6.1. INTERNATIONAL SOS CARD

The International SOS Card provides worldwide medical, security, travel and emergency assistance whilst travelling overseas. The International SOS card can be issued in one of two forms:

- existing plastic card - to be phased out by 30 June 2020; or
- digital card – Department's preferred option.

The insurance coverage is the same on both cards.

The digital SOS Card can be accessed via a free mobile application which can be downloaded onto a smart phone allowing worldwide access to medical, security, travel and emergency assistance, whilst travelling overseas. Refer to the following [website link](#) for more details on the mobile application.

To obtain either the digital or plastic SOS card, email the Financial Reporting Officer, Financial Services - [traveldeclarations@education.wa.edu.au](mailto:traveldeclarations@education.wa.edu.au).

The following items are available from the Financial Reporting Officer, Financial Accounting and Reporting:

- digital or plastic SOS card;
- instructions on how and when to use it; and
- information on the travel policy.

Employees should:

- decide if the cover is sufficient or whether they will need to make their own arrangements for additional cover (e.g. if extending travel and arranging additional cover, check with insurance company that cover is appropriate and claimable);
- notify the line manager of any known pre-existing health conditions; and
- return the plastic SOS card if they have one immediately upon completion of the travel to the Financial Reporting Officer, Financial Accounting and Reporting.

If the plastic SOS card is lost or stolen, travellers should notify the Financial Reporting Officer, Financial Accounting and Reporting. The mobile application for the digital SOS card can be downloaded as many times as required.

Further information regarding comprehensive insurance cover can be obtained from [ICWA Comp Cover](#).

Further information regarding SOS services can be obtained from [International SOS](#).

For information about ongoing health conditions that may require attention while overseas, refer to the smartraveller website below <http://smartraveller.gov.au/Pages/default.aspx>

## B.7. FREQUENT FLYER POINTS

In accordance with the Premier's Circular on air travel, officers must not use points accumulated on government business travel under the 'Frequent Flyer' scheme to acquire personal benefits, such as upgrading of tickets above normal travel entitlements, or for private travel. It is acceptable, however, to accept travel incentive bonuses if they are utilised for the Department's benefit, such as free travel for official business.

## B.8. VEHICLE HIRE

If a vehicle is required, all officers on domestic travel must hire vehicles in accordance with State Supply Commission policy requirements. For further information refer to the [Government Contract Directory: Education Edition – Motor Vehicle Rental Services](#).

The vehicle hired to be suitable for the purpose of the travel and vehicle usage to be in accordance with the Motor Vehicle Rental contractor's conditions of use. The vehicle type is to be nominated on the Travel Application Form. Vehicles will not be booked or upgraded without appropriate approval from the authorising officer. An alternative rental agent may be used if a suitable vehicle cannot be confirmed with the Motor Vehicle Rental contractors.

Under no circumstances can officers use the purchase card for vehicle hire relating to private use.

## B.9. TELECOMMUNICATIONS

If required for international travel, the traveller should organise to have a pre-paid international roaming service or roaming sim cards that allow easy and cheap phone access from their mobile phone, tablet or laptop. This should be approved and installed on their Department mobile device.

## B.10. OVERSEAS TRAVEL

### B.10.1. DEPARTMENT OF FOREIGN AFFAIRS AND TRADE (DFAT)

Travellers should familiarise themselves with:

- Contacts for Australians needing help overseas including embassy and/or consulate details.
- Department of Foreign Affairs and Trade (DFAT), Austrade or WA Trade Office details.

Officers must not travel on official business to countries or areas where DFAT advises a Level 5 warning of "Do Not Travel".

Employees should take note of any ongoing threats of terrorist activities, including bombings, hijackings, kidnappings, suicide operations, drive-by shootings, etc.

DFAT travel advice regarding the specific country should be consulted prior to departure at: <http://www.smartraveller.gov.au/index.html>. Things to look for include:

- safety and security;
- local laws;
- entry and exit requirements;
- health issues; and
- where to get help.

DFAT Smart-Traveller encourages Australian travellers to lodge travel plans with DFAT through the Smart-Traveller Online Registration website.

#### B.10.2. PERTH CONVENTION BUREAU

If an officer's travel includes attending an overseas conference or meeting as a delegate, the officer must contact the Perth Convention Bureau prior to the travel. See the Premier's Circular on airline travel for more information.

#### B.10.3. STAYING IN TOUCH

All officers travelling overseas are required to:

- keep in contact with the business unit manager/principal if working in a country on their own, without local Department support; and
- leave details of emergency next of kin contacts in Australia with the business unit manager/principal. Such information will not be accessed unless and until there is a situation requiring medical care and/or evacuation (see Appendix I and J).

#### B.10.4. EVACUATION PLAN

On arrival, officers travelling overseas are required to familiarise themselves with the evacuation plans for any buildings in which they are working or staying.

In the case of an emergency that may involve a natural disaster, terrorist attack or civil disturbance, officers travelling overseas are required to, either personally or through their local management team:

- attempt to contact DFAT (the nearest embassy, high commission or consulate), the Department and their emergency contacts in Australia; and
- telephone the number on the International SOS card and seek instructions on what they should do to ensure their safety.

Project managers or tour coordinators are required to:

- obtain a phased evacuation plan prepared by the local management team if working in the country as part of a project team;
- prepare an up-to-date staff call-out tree if work is undertaken in the country as part of a project team;
- monitor events closely through the media or local contacts and, where possible, verify and corroborate reports via different sources; and
- keep the Department management informed, if possible.

The business unit manager/principal responsible for the travelling officer is required to keep the Director General informed of any evacuation incidents and escalating advice immediately if the situation is known.

In instances where the situation deteriorates slowly enough for DFAT to advise the Department of the evacuation, the traveller will be evacuated via regularly scheduled flights. In cases where it is not able to do this, Australian consular assistance will become necessary.

#### B.10.5. PASSPORTS

An officer travelling is responsible for obtaining a current private passport. Sufficient time should be allowed to obtain the necessary visas through the relevant embassy.

Private passports must be current and have a minimum of six months before expiry from the date of return to Australia. Refer to <http://www.dfat.gov.au/visas/> for further details.

For information on official passports refer to the current *Premier's Circular*.