



LEEDS
BECKETT
UNIVERSITY

Guidelines for UK and International Travel

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Guidelines

1. Purpose

- 1.1 This document sets out our University guidelines in relation to all employee travel on official University business, excluding that between University campuses. It defines the responsibilities of all employees in line with University policies and procedures relating to travel on official University business and provides guidance for all managers on managing the process.
- 1.2 The guidelines provide a fair and consistent framework in which employees who undertake travel on behalf of our University do so with regard to our Sustainability Policy objectives, and ensure that all business travel provides value for money.

2. Principles

- 2.1 The following principles underpin these guidelines:
 - As part of their routine management activities, managers of employees who travel should ensure awareness of our University's Sustainability Policy objectives and that approval of travel is in accordance with the policies and procedures referred to in these guidelines. Travel, when necessary must be authorised in advance unless there are exceptional circumstances.
 - Travel must be undertaken only when necessary and be consistent with the needs of our University. Our University's sole provider of travel and hotel services is Co-operative Travel Management – no other travel agency or travel provider should be used.
 - Employees are encouraged to consider alternatives to travel to minimise our University's impact on the environment, for example, video conferencing and other teleconferencing media, facilities and equipment that are available.
 - Employees who have to undertake travel on behalf of our University should do so with regard to personal safety and comfort consistent with the nature and purpose of individual journeys, and to ensure that all business travel and associated costs provide value for money.
 - Judgements about value for money should take into account staff costs where the most economical method of travel necessitates a longer absence than would a less economical method.
 - All UK and international travel arrangements should be booked in compliance with our University's Financial Procedures and in good time. Early booking may facilitate discounted fares and accommodation costs; and will allow sufficient time for the necessary risk assessments, pre-travel medical screening and travel documentation including insurance to be processed.
 - Employees will be allowed to travel only to international destinations considered appropriate and safe by our University, and approved through our Overseas Visit Proposal (OVP) process (overseen by the International Office) at least 31 days in advance of the trip, regardless of whether the costs are being met by our University or a third party.

- The policy and related procedural provisions with regard to insurance outlined in our University's Financial Procedures – Part E – Insurance Guidelines are mandatory.
- Employees may also incur costs themselves and claim reimbursement subject to our University's Financial Procedures – Part D – Staff Expenses Procedures. Under certain circumstances, employees may be provided with a cash advance for travel purposes.
- Claims for reimbursement of travel expenses should be made as soon as possible and in any event no later than three months after the date incurred. Certain travel expense payments may be subject to tax as determined by HM Customs and Revenue from time-to-time.

3. Definitions

3.1 In these guidelines, the following words / phrases are defined as:

"employee" – someone who has a contract of employment with our University.

"official University business" – is any associated travel undertaken by an employee that involves a journey by whatever means away from their normal place of work to another location in the UK and internationally, including where relevant, use of overnight accommodation, meals and other incidental journeys; but does not include travel between University campuses in Leeds.

"sustainable travel" – adopting travel behaviours and decisions, which support the achievement of sustainable development objectives. These include wider work behaviours and decisions which reduce or avoid completely the need to travel.

"international travel" – any travel outside the United Kingdom.

"flight time" – the total period in which the employee is travelling as a passenger from one identified airport to the final destination airport; this includes all sectors of travel and stopovers.

"short haul" – is where the combined flight time is less than four hours.

"long haul" – is where the combined flight time is four hours or greater.

"subsistence" – accommodation and catering.

"out of pocket expenses" – examples may include telephone calls, faxes, internet access and parking fees.

4. Insurance

4.1 Our University's Insurance Guidelines outline the arrangements that are in place to cover authorised travel on official University business (see Financial Procedures – Part E – Insurance Guidelines). These insurance arrangements apply to employees and other approved University representatives only, unless other additional items, as

specified in the Insurance Guidelines are covered. Our University's insurance policy may not cover employees for any period before or after the official University business trip that is used for leisure purposes.

5. Travel arrangements

- 5.1 Our University's sole provider of travel and hotel services is Co-operative Travel Management – no other travel agency or travel provider should be used. Further details for booking rail travel, hotels and flights are available through the Co-operative Travel Management website.
- 5.2 The Co-operative Travel Management service have produced a helpful guide outlining their services, which is available on the Financial Services webpage.

6. Employees using public transport

- 6.1 Bus, coach or rail should be the default option for all UK mainland journeys between locations with or close to a station. Taxis should only be used for local journeys, where issues of time, convenience or public safety would make public transport impractical.

7. Employees travelling by car

- 7.1 Where, having considered the cost, convenience and carbon-footprint, the most appropriate mode of transport is car use, there are additional considerations that can improve sustainability. Our University's 'Car Plus' web pages outline a variety of choices available to employees such as Car Share, City Car Club, Car Hire, which should help to plan car journeys and reduce driving costs and impact on the environment, including tips on greener driving.

8. Employees using their own vehicles

- 8.1 If an employee uses their own vehicle on official University business including cars or motorcycles, it must be insured by the employee for business use and be in a roadworthy condition (see Financial Procedures – Part E – Insurance Guidelines).
- 8.2 By authorising the relevant expenses claim form the manager and/or relevant budget holder is accepting responsibility for ensuring that the claimant has completed and signed the relevant form on the Insurance Cover & Claims webpage.

9. International travel

- 9.1 All employees wishing to travel internationally for any official University business purpose for example, conference, research or international recruitment activity, must agree the purpose of the travel, the remit of the trip, the costs associated and the time required to undertake the travel, with their manager and/or relevant budget holder.

- 9.2 For all international travel, employees must use the Overseas Visit Proposal (OVP) process overseen by the International Office at least 31 days in advance of the trip, regardless of whether the costs are being met by the University or a third party. The purpose of the OVP database is to ensure the visit is authorised, that we are able to monitor the scale and frequency of international visits as well as being able to contact employees in case of an emergency whilst outside of the UK.
- 9.3 When planning a visit overseas employees should check whether the proposed destination is an 'at risk' area by checking with the Foreign and Commonwealth Office (FCO) website before proceeding further. Employees should note that our University's insurance would not cover employees travelling against FCO advice. Where FCO advice is not to travel, employees should speak with their manager as soon as possible.
- 9.4 Expenditure on any travel or accommodation not pre-booked through Co-operative Travel and agreed by the Purchasing Office, should be guided by our University subsistence rates available on the Staff Expenses Claim Form or by contacting the campus Finance team.

10. Safety, health and wellbeing arrangements

- 10.1 Most risks involved with international work and travel are avoidable. This may involve minor changes to normal practices and procedures, which an employee would follow if the work and travel were in the UK. In this regard, our University's Safety, Health and Wellbeing team have developed some helpful information on Working Overseas available online. The H.E. sector has also developed Health and Safety Guidance When Working Overseas.
- 10.2 Employees should complete a Working Overseas Risk Assessment form before travelling as well as submitting a confidential Pre-Travel Health Consultation form to our Occupational Health Service to check out medical requirements at least six weeks before an employee travels for the first time or following any significant change to their health.
- 10.3 The Pre-Travel Health Consultation forms are screened and the employee may be invited for an appointment with our Occupational Health Service if any health issues are identified. Where a health issue is identified, our Occupational Health Service will advise that the health issue may be exacerbated by international travel and that this should therefore not take place or be postponed; or that reasonable adjustments are required before the international travel occurs. It is the responsibility of the employee to notify our University of any changes to their health situation in between the regular screening process.
- 10.4 Our Occupational Health Service will also advise through the health screening process about additional insurance provision necessary to cover individual health related issues.

Where additional individual cover is required this will be provided by our University through its insurance policy.

- 10.5 The employee should review the risk assessments upon arrival at the destination and modify them in light of the particular circumstances and the local conditions found there at the time.
- 10.6 Our Occupational Health Service has also produced a helpful guide on 'Travellers Health & Safety'. In addition, the NHS provides travellers with important health advice, including details of countries outside the European Economic Area (EEA) that employees may be visiting which provide reciprocal health care to UK residents. Details can be found at www.dh.gov.uk/travellers.
- 10.7 All employees who are nationals of a European country should ensure that they have an up-to-date European Health Insurance Card (EHIC) as this will need to be presented to the medical institution abroad. If an employee is unable to present an EHIC card, this can adversely affect the health cover under our University's insurance policy and could expose a risk to the individual of being personally liable for medical care costs. An EHIC can be obtained online from www.ehic.org.uk.

11. Working time and rest periods

- 11.1 Employees must ensure that they have adequate rest before, during and after their trip and our University recommends that the necessary rest periods are taken during international business travel and these should be appropriate to the nature, destination and duration of the trip.
- 11.2 As a guide, employees who have undertaken 'long haul' travel are advised to take one working day's rest on arrival and one working day's rest on return to the UK. In relation to the latter, this can be taken immediately on return to the UK, but no later than five working days afterwards. Official paid 'rest days' cannot be banked or used after the five working day period.
- 11.3 Employees who travel internationally on official University business, and who take a period of annual leave on arrival or before returning to the UK, will not be entitled to the specified paid 'rest days' and must ensure that adequate rest is taken before returning to work.

12. Staff expenses

- 12.1 The Staff Expenses Procedure (see Financial Procedures – Part D – Staff Expenses Procedures) describes our University's procedure for the authorisation and reimbursement of expenses relating to UK and international travel, accommodation, subsistence and business related expenditure whether incurred by University purchase order, by University purchase card or personally by individual members of staff. It should be noted that staff expenses incurred in connection with travel and subsistence but paid

for using a purchase card must comply with both the Staff Expenses Procedure and the Purchase Card Procedure (see Financial Procedures – Part C – Purchase Card Procedures).

- 12.2 The Staff Travel and Related Expenses Proposal and Claim Form must be used to reclaim costs associated with UK travel. The Overseas Visit Proposal and Claim Form must be used for all subsistence claims relating to international travel, which is available from the International Office. Overseas subsistence rates should be guided by our University's existing rates available on the Staff Expenses Claim Form or by contacting the campus Finance team. Employees are entitled to claim the actual cost of meals and drinks as expenses, but this must not exceed our University's policy maximum.
- 12.3 Under certain circumstances, employees may request a cash advance to cover up to 80% of the proposed out-of-pocket subsistence expenses on an approved staff visit. Any advance not subsequently spent or not accounted for via itemised receipts, must be repaid immediately on completion of the trip. The proposal section of the Staff Travel and Related Expenses Proposal and Claim Form must be completed as normal. In addition, the proposal must include the full proposed cost of the subsistence expenses and should be endorsed to the effect that a cash advance is required. A Payment Requisition Form must then be completed by the Resource Centre, authorised and sent to the Creditors Section with a copy of the proposal attached. The advance payment will then be made via BACS into the member of staff's bank account. The final claim when submitted must be completed in respect of the gross expenses and must include a deduction equivalent to the amount of the advance. The completed claim form can then be processed in the normal way.
- 12.4 It is the responsibility of Deans and Directors of Service to ensure that staff are made aware of the existence and content of our University Financial Regulations and associated Financial Procedures.
- 12.5 It is the policy of our University that all claimants are only reimbursed for the actual costs and expenses wholly, exclusively and necessarily incurred in performing business activities for our University's benefit. The policy is based on HM Revenue and Customs guidelines so that claimants and our University should not incur tax liabilities/penalties.

13. Useful Websites

International travel - www.fco.gov.uk/travel

Travel advice by country - www.fco.gov.uk/en/travel-and-living-abroad/travel-advice-by-country/

Health advice for travellers – <http://www.nhs.uk/Livewell/TravelHealth/Pages/Travelhealthhome.aspx>

Healthcare abroad – www.dh.gov.uk/travellers

Travel checklist - www.fco.gov.uk/en/travel-and-living-abroad/staying-safe/checklist

When things go wrong - www.fco.gov.uk/en/travel-and-living-abroad/when-things-go-wrong/

Disabled travellers - www.fco.gov.uk/en/travel-and-living-abroad/your-trip/disabled-travellers

LGBT travellers - www.fco.gov.uk/en/travel-and-living-abroad/your-trip/LGBT-travellers

Women and lone travellers - <https://www.gov.uk/guidance/advice-for-women-travelling-abroad>

Be a responsible traveller - <https://travelaware.campaign.gov.uk/>