

**MEMORANDUM TO:** Heads of Schools

Heads of Departments

Heads of Budget Units

**C.C.:** Dean  
Faculty of Medicine, Dentistry & Health Sciences

**FROM:** Caroline De Losa  
Manager (Resources & Planning)  
Faculty of Medicine, Dentistry & Health Sciences

**DATE:** Monday, 26 March 2007

**SUBJECT:** **Travel on University Business**  
**Travel on Business Class**

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Following a meeting with the Internal Auditor, Mr Peter McGrath and the University's Tax Accountant, Mr Stuart Smith regarding the policies around business class travel, I felt it appropriate to clarify the processes in place within the Faculty to ensure compliance with University policy and Australian Taxation laws.

All travel arrangements made must be cognisant of the University's travel policy (accessible from the website <http://www.unimelb.edu.au/ppp/docs/14.html>):

**1. Travel Approval**

Unless exceptional circumstances apply, all travel must be approved before departure. The HR18 form is to be completed and authorised by an approved delegate. Delegations for approval within the Faculty are:

<b>Person seeking approval</b>	<b>Delegate</b>
Academic or Professional staff who are not Heads of Department.	Head of Department.
Heads of Department.	Dean
Deans	Vice-Chancellor or Deputy Vice-Chancellor (Students and Staff).

*Caroline De Losa, Manager (Resources & Planning)*  
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### **Substantive paperwork**

The HR18 form should be accompanied with a travel itinerary if greater than 5 days (including weekends) within Australia and for all overseas trips. And likewise travel diaries should be maintained for the duration of these trips.

The Australian Taxation Office is very firm on the work to personal time ratio, and without an itinerary fringe benefit tax may be applied. Likewise appropriate diary evidence may result in claims for reimbursement denied by The University of Melbourne.

Assessment of the staff member's fitness to travel along with their safety whilst away, should be undertaken. Supervisors should authorise the medical questionnaire, accessible at:

[http://www.unimelb.edu.au/ehsm/Travel\\_Authorisation\\_Form.pdf](http://www.unimelb.edu.au/ehsm/Travel_Authorisation_Form.pdf)

and visit the Department of Foreign Affairs and Trade (DFAT), accessible at: <http://www.smarttraveller.gov.au/> for the most current travel warnings.

Such undertaking in the event of any insurance claims demonstrate that all reasonable steps where undertaken to ensure the safety of the staff member.

### **2. Travel on Business Class**

**Only the Dean has the authority to approve travel for Business Class.**

Staff seeking approval are to provide evidence of support from their supervisor and Head of Budget Unit outlining the reason business class is being sought and the source of funds, in line with the Personal Policy & Procedures Manual, 14.1.4.5.

If travel is to be reimbursed from an external agency – written confirmation must be provided that substantiates the agency's approval to travel business class.

The Dean's authorisation to travel business class is not open ended.

Applications should be submitted to the Dean with adequate lead time (3 working days) prior to the purchase of the fare to enable due consideration of the request.

### **Further queries and advice**

The University Policy and Procedures are comprehensive in their guidance relating to travel. Should additional assistance be required Financial Operations, Human Resources, Internal Audit and the Risk Office can be contacted.