



# Business Travel and Accommodation

## Booking Policy

This policy document relates to both UK and international travel and accommodation bookings.

The University will only provide reimbursement of the costs of necessary 'business travel', which is defined primarily as travel for a necessary business purpose between one workplace and another, for example, travel by an employee in the performance of their duties and/or staying at a place they have to attend in the performance of their duties, as long as the journey is not ordinary commuting or private travel.

The University will pay for or reimburse the cost of the travel - subject to the specific guidance detailed below;

Whilst travelling on University business, staff must always seek to obtain the best value for money, no matter what mode of transport or type of accommodation booked. All factors to ensure value for money should be considered, for example, venue location, part of a wider package (conferences), early booking discounts etc.

Guidance on financial limits are published on FPD1 sharepoint, deviations from these limits must be approved in advance by your Head of Department (HoD).

### **Booking through Travel Management Company's (TMCs)**

The University has arrangements in place with two Travel Management Companies (TMCs - Diversity Travel and Key Travel) to provide all travel and accommodation requirements; and staff should look to these TMCs in the first instance. This negates the need for staff to incur time and costs themselves (and subsequently claim and wait for reimbursement), as the University will pay the supplier directly.

The University also has access to certain benefits when booking through TMCs, such as academic fares, which include elements such as:

- Holding flights for 72hours (excepting low-cost airlines).
- Extra baggage allowance on flights.
- Accommodation quality and safety standards have been verified.
- Sustainability climate impact data provided and carbon reporting.
- Split charging to allow one trip to be booked for University and non-University travellers (e.g. a family member).
- Centralised records to support FOI requests.

Colleagues are encouraged to approach at least one of the TMCs to quote for their travel; however, it is permissible to look for an alternative supplier. Staff must obtain approval from the Head of Department/School/Section prior to making any booking.

## **Non-TMC booking**

If the decision is made to book through an alternative supplier there are several checks the traveller must have completed prior to the booking being made:

- Flights – the carrier must be IATA registered. The traveller is responsible for the check of any terms and conditions relating to the flight prior to booking, for example, non-refundable fares.
- Accommodation – to ensure that colleagues will be safe during their stay, they must verify and confirm that the following measures are in place:
  - The property owner has Public Liability Insurance in place for at least £5 million.
  - Smoke detectors have been fitted and tested regularly.
  - If a gas boiler/appliance is fitted, it has been inspected and serviced by a qualified engineer within the last twelve months.
  - A carbon monoxide detector is fitted and has been tested.

The University's financial regulations define the class of travel that can be booked, and this must be rigidly adhered to (the default is economy flights). Colleagues wishing to travel at anything other than economy must first demonstrate the health, safety and wellbeing need for doing so, and obtain approval to do so from the Occupational Health Team and their Head of Department/School/Section before any bookings are made.

The hotel room rental rates are set out in the University's financial regulations (for UK travel) and the HMRC Worldwide Subsistence Rates. Any deviation from these rates must be approved in advance by the Head of Department/School/Section before any bookings are made.

Some colleagues may be abroad for extended periods of time and so wish to be accompanied by family members. The University will not fund the travel/accommodation costs for third parties. There may be exceptions such as carer responsibilities in which case approval must be obtained from the Occupational Health Team prior to the booking being made.

Should you encounter difficulties with your flight or accommodation booking made via a TMC please refer to [procure@essex.ac.uk](mailto:procure@essex.ac.uk) for guidance. If you have chosen to book outside of the TMC facility it will be your responsibility to liaise with those suppliers directly to remedy the situation. Colleagues will need to factor in the time and cost to the University associated with making their own business travel arrangements.

It must be noted that when making your own travel arrangements you may not have access to the benefits set out in the section above (booking through TMCs), so there could be additional costs for cancellations, additional luggage etc.

No matter the type of booking you have made, you must also ensure that you have completed and submitted a Travel Insurance form at least two weeks prior to your trip to ensure that the University's insurance policy is in place to cover you and your activities whilst travelling.

## **Paying for travel and accommodation**

If booking through one of the TMCs, then that supplier will invoice the University directly. The invoice will be paid centrally by the FPD Payments Team, who will in turn allocate the costs within Unit4 against the relevant budgets.

If a booking is made outside of the TMC, then payment will be processed differently.

- Purchasing Card – it may be possible to use a University Purchasing Card held by your Department/School/Section. However, some airlines/hotels require the payment card to be presented when checking in, so this option may not be feasible for some travellers. It is

University policy to restrict the number of Purchasing Cards it has in circulation; it will not issue cards to all travellers wishing to make their own travel arrangements.

- Expenses – There may be a requirement for the traveller to pay using their own funds and request reimbursement through the online expenses system. Itemised receipts/bills must be submitted in support of your claim. It is essential that the traveller must have pre-approval from the Head of Department prior to booking any travel or accommodation.

### **Record keeping**

Colleagues are required to retain all invoices/receipts relating to their business activities for audit purposes and to support any claims that may be made for reimbursement of costs. Colleagues should note that this information may be required for any Freedom of Information requests.