

Staff Overseas Travel Procedure

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Version Control History

Version Number	Date of Change	Summary of Revisions Made
5	March 2016	<p>Major revision.</p> <p>Section 1 purpose expanded to add a requirement for staff to acquaint themselves with the contents prior to travel. Scope extended to include the need to seek advice from Senior Manager on any issues not specifically covered in the Procedure prior to travel. Definitions added for reasonable expenses and official receipt.</p> <p>Revised responsibilities for lead traveller and all travellers.</p> <p>Permission to travel clarified, including the prohibition of family members accompanying business travellers without SMT consent.</p> <p>Additional information added on travel arrangements, travel insurance, travel documentation, passports/visa/inoculations, expenses and receipts. New section added on Post-trip reports.</p>
5.1	November 2016	Footer updated to reflect new template model.
5.2	December 2018	Role change to Quality Manager and other job titles to adhere to the new structure.

Staff Overseas Travel Procedure

1 Purpose

Under the Health and Safety at Work Act 1974 a duty of care is imposed on Perth College UHI to ensure the safety of any staff member travelling on College business overseas.

This is the College procedure on official staff travel overseas. All staff scheduled to travel overseas on College business are to acquaint themselves with its contents prior to travel.

This procedure is to ensure that the appropriate line manager and senior management team member are fully informed and have approved all overseas travel by staff.

This includes ensuring appropriate checks have been taken to safeguard the member(s) of staff concerned.

2 Scope

This procedure covers all official staff travel overseas, including CPD and attending conferences. Any specific issues that are not covered by this procedure, for any mode of transport must be referred to a Senior Manager for decision as soon as they are identified, and before the journey is undertaken.

This procedure applies equally to all grades of staff.

3 Definitions of Terms Used in this Procedure

Lead Traveller: The Lead Traveller is either a single staff member travelling or the person who is designated as the Lead Traveller for the purposes of this procedure.

'Contact Buddy': In order to be assured of the safety of all staff travelling overseas it is important that the Lead Traveller makes an arrangement with another member of staff, ie a contact buddy, within the college to make regular contact whilst overseas.

Itinerary: This will be an important document providing key information on the overseas trip including the contact details of those involved as well as the accommodation and travel details, and a list of all activities to be undertaken.

Estimated Cost of Trip: These costs are indicative and to provide knowledge of whole college overseas travel expenditure. Budget responsibility lies with the budget holder, but costs are required to be indicated as part of the approval process.

Reasonable Expenses: A payment for goods or services that is appropriate to the conditions of travel, and is acceptable to the company (see section 6.2).

Official Receipt: A receipt accepted in return for payment for goods and services. Please note that a credit card voucher is not an official receipt.

4 Responsibilities

- 4.1 The SMT member within the direct reporting line of the Lead Traveller is responsible for authorising staff overseas travel.
- 4.2 The Chair of the Board of Management (BoM) is responsible for the authorisation of overseas travel by the Principal/Chief Executive Officer (CEO).
- 4.3 The SMT direct line reporting manager (or Chair of BoM) is responsible for forwarding the Risk Assessment completed as part of this procedure (Appendix 2) to the International and Corporate Services Director where any of the questions on the Risk Assessment are answered as 'No'.

In the absence of the Chief Operating Officer, the Depute Principal External Engagement is the SMT member responsible for health and safety and must be contacted instead.

- 4.4 The Chief Operating Officer is responsible for liaising with the Health and Safety Officer where there are unresolved concerns regarding Risk Assessment.
- 4.5 The Lead Traveller is responsible for completing the Staff Overseas Travel Request Approval Form (Appendix 1).

The Lead Traveller must take responsibility for ensuring that arrangements have been made to be accompanied by an appropriate and known organisation (eg for CPD), agency (eg for those attending conferences), foreign national or approved agent.

The Lead Traveller is responsible for checking and sharing the ongoing status of travel advice throughout the trip.

- 4.6 All travellers are responsible for ensuring that their Line Manager has provided approval in principle to travel.

All travellers are responsible for completing their own Overseas Travel Risk Assessment Form (Appendix 2).

All travellers are responsible for ensuring that the 'Contact Buddy' has information on who is the appropriate SMT direct line reporting manager.

All travellers are responsible for obtaining information regarding recommended inoculations in advance of travel.

- 4.7 The 'Contact Buddy' is responsible for informing the appropriate SMT direct line reporting manager (or Chair of BoM) in the event of a scheduled contact with the Lead Traveller being missed.
- 4.8 The Property Secretary is responsible for co-ordinating the Perth College UHI travel insurance provision. Contact details are given in Appendix 4.

5 Overseas Travel Procedure

5.1 Permission to Travel

- 5.1.1 No travel overseas by any member of staff can take place without the express approval of each traveller's line manager and SMT member/Chair of BoM. No spouse/partner or any other member of a traveller's family may accompany any business traveller without express consent from SMT member/Chair of BoM.
- 5.1.2 In the first instance all travellers must obtain by e-mail approval in principle from their line manager.
- 5.1.3 When there is evidence that such permission is granted the Lead Traveller must complete in full the Staff Overseas Travel Request Approval Form and send to travellers.perth@uhi.ac.uk. This form is provided as Appendix 1.
- 5.1.4 All travellers must complete an Overseas Travel Risk Assessment Form. Each traveller must send a meeting invite to travellers.perth@uhi.ac.uk attaching the approval e-mail from their line manager and the Overseas Travel Risk Assessment Form. This form is provided as Appendix 2 in this document.

Appendix 6 in this document provides a step by step guide to the above procedure.

5.2 Travel Arrangements

No business class travel can be requested. Class of travel will depend on the distance, carrier, availability, cost and the traveller's itinerary.

- All travel bookings must be made through our agents in line with procurement guidelines unless previously approved. Employees are not permitted to specify a preferred carrier to agents.
- Pay-as-you-go airport lounges may only be used if agreed in advance with manager (eg if there is an extended, planned lay-over between flights) or if a flight delay exceeds 3 hours.
- All air miles generated on College business are the property of the employer. Subject to airline rules these may be "banked" for the College at the point of booking through the agent or collected on individual reward cards.

There must be at least one rest day in every 7 scheduled into the itinerary. Time spent working and travelling days during weekends and holiday periods should be taken back on a like for like basis. Rest days are not eligible for time back.

5.3 Risk Assessment

5.3.1 A specific risk assessment form has been developed for the purpose of staff travelling overseas (Appendix 2). Guidance on completing this specific risk assessment is given in Appendix 3, and a list of frequently asked questions, with answers, is given in Appendix 4.

5.3.2 Any staff travelling abroad on operational business for the first time must consult with the International and Corporate Services Director, as must any member of staff where the SMT authorising member requests this (eg, where a question in the Risk Assessment is left blank or answered as 'No').

5.3.3 It is critical that the Lead Traveller makes a final check of the Foreign and Commonwealth Office (FCO) website for the area they are visiting as close as possible to the departure date and brings to the attention of the SMT/BoM member approving the travel any changes from that information already provided on the Staff Overseas Travel Request Approval Form.

The link for the FCO website is:

<http://www.fco.gov.uk/en/travel-and-living-abroad/travel-advice-by-country/>

5.3.4 The Lead Traveller must also take local advice before travel from their overseas host(s), if relevant, regarding suitable/unsuitable areas to visit, carrying valuables, suitable/inappropriate attire and any other relevant information. Such consultation should be kept up throughout the trip, as appropriate. This ongoing consultation will inform any additional control measures required to minimise any newly identified risks as they arise.

5.3.5 If you have a pre-existing medical condition for which you take prescribed medication you need to check whether the medication is legal in the country you are travelling to. The Embassy or High Commission of the country you are visiting can advise.

5.3.6 All travellers must carry a College mobile phone with them for the duration of the trip. Travellers who do not ordinarily have access to such a device can book one in advance from the ICT Helpdesk (see Section 6.2.4 regarding eligible expenses).

5.4 Travel Insurance

5.4.1 Perth College UHI provides travel insurance. Staff must contact the Property Secretary to ensure sufficient and suitable cover is in place.

5.4.2 If you have a pre-existing medical condition you must contact the Property Secretary with regard to insurance cover. If you do not disclose a pre-existing medical condition which is subsequently found to invalidate the college travel insurance you may not be covered by the college or any of its insurance policies.

- 5.4.3 All staff travelling to Europe must obtain a **free** European Health Insurance Card (EHIC). This will entitle UK residents access to necessary medical treatment during a temporary visit to the European Economic Area (EEA) and Switzerland. There are certain countries outwith the EEA that offer free or reduced fees for medical treatment.

Online application and further information can be found at:
<https://www.gov.uk/european-health-insurance-card>

5.5 Travel Documentation

- 5.5.1 Documentation and useful information that travellers are recommended to have with them are:

- Details of College insurance policy.
- Details of College travel agents.
- EHIC for EEA and Switzerland travel.
- Documents related to transport considerations (passports and visas). It is recommended that staff have a photocopy of their passport in case of loss or theft. UK passport holders may wish to inform the Embassy in the relevant country they are visiting of arrival and departures dates.
- Address and telephone number of the relevant Consular Office or Embassy for UK passport holders in the destination country.
- Address and telephone number of international hospitals/clinics in the destination country.
- Inoculation records.
- A doctor's letter and a copy of any prescriptions for medication you have with you while travelling. See section 5.6 for more information on this.

This list is not exhaustive and consideration should be given to any other suitable documentation identified in the Risk Assessment. A list of frequently asked questions is available in Appendix 4.

5.6 Passports, Visas and Inoculations

5.6.1 Passports

A passport is considered to be a personal document and the responsibility of the individual, in which case individuals will be responsible for provision of their own passport. Exceptions that may be considered to this are as follows:

- A requirement to travel urgently, where the passport has less than 6 month's validity remaining.
- Replacement of a valid passport that has insufficient blank pages.
- Additionally, the College may consider payment of:

- The difference between costs for a standard passport and the larger 48 page version, at the time of standard renewal.
- The difference between the costs for a standard passport application and expedited application where circumstance are outwith the control of the member of staff.

5.6.2 Visas

The College will pay for all visas, travel documents etc, required by staff travelling on College business to countries where these are required.

5.6.3 Inoculations

It is the responsibility of all travellers to ensure that they check the requirement for inoculations advised by the FCO.

All travellers are strongly advised to have all of the **recommended** inoculations. Staff who do not must declare this on Overseas Travel Risk Assessment Form (Appendix 2).

The College will pay for staff inoculations/vaccinations and specialist medical treatments, where these are recommended (only as per FCO advice) for travel to a specific location on College business.

5.7 Promotional Incentives

The purchasing decision should not be influenced by any promotional incentives such as airline mileage credits, customer loyalty points, or personal credit card discounts or rebates/vouchers. Claimants should not benefit personally from any such incentives. The use of air mile credits obtained from business travel for use on private travel is an unacceptable personal benefit from expenditure of public funds. See item 5.2.

5.8 Expenses/Receipts

Staff undertaking official travel on College business may be issued a sum of money deemed to be adequate to cover the cost of legitimate business expenses during the journey, as stated in the paragraphs below. Official receipts must be retained and submitted to the budget holder accompanied by a business trip expenses form and any unused sums upon return.

Where the issued sums do not fully cover all legitimate expenses incurred, or where it was not possible to issue money before departure, staff can claim reimbursement by completing an expenses claim form.

It is recognised that in some overseas countries it is not the custom to issue receipts for small amounts such as taxi fares, meals etc. In such cases the traveller must keep a record of such amounts and submit this record to the finance department on return.

5.8.1 Transport Expenses

Carriage to and from domestic airports should be arranged through the International Centre. Personal mileage plus parking will only be paid where the cost is less than an arranged transfer.

Transport to and from the destination airport and hotels may either be pre-booked with tickets, provided by the customer, agent or CPD/conference agency, or upon payment by staff and later reimbursed. For safety reasons, where members of staff are taking taxis on arrival at international airports they must only use official taxis and not private hire.

5.8.2 Subsistence – Eligible Expenses

- Meals and non-alcoholic refreshments where not booked as part of a package.
- Room service on occasion where lone traveller or on late arrival.
- Taxi and internal transport costs for business purposes.
- Cost of local sim card where appropriate.
- Cost of internet service where no free wi-fi is available and connectivity is business critical.

This list is not exhaustive.

5.8.3 Non-Eligible Expenses

- Newspapers, magazines etc.
- Alcohol where not with client as part of a meal.
- Taxi fares for non-business purposes (ie sightseeing).
- Telephone calls made from the staff member's personal mobile phone.
- Medicines available without prescription.
- Toiletries.
- Entertainment for which a separate charge is made.

This list is not exhaustive.

5.8.4 Use of Mobile Phones

The use of College mobile telephones is limited to business use only, with the exception of one reasonable contact call home per day. Where possible Skype/Facetime and other web-based call services should be used over wi-fi connection. Staff are expected to apply a fair-play approach to the amount of time spent on the phone.

Data roaming **must** be disabled outwith the EU and only enabled for a short periods at a time where access to internet services (eg e-mail) is critical and wi-fi is not available.

Where staff are expected to be overseas for more than 10 days, they should notify the ICT Helpdesk to have the overseas bolt-on activated. If a large number of in-country calls are anticipated, a local sim card should be purchased.

5.8.5 Receipts

Receipts must identify the nature of the expenditure, the company receiving payment, time and date of expenditure.

Where company credit cards are used, the credit card payment slip alone is not sufficient, and an official receipt must be requested.

It is recognised that in some overseas countries it is not the custom to issue receipts for small amounts such as taxi fares, meals etc. In such cases the traveller must be able to account for such expenditure and is required to keep a record of such amounts and submit this record to Finance on return to College.

Where the expenditure is incurred within the EU, a VAT receipt is required.

5.9 Post Trip Report

The Lead Traveller must complete a Post Trip report on return to the workplace. This can be found at Appendix 5.

6 Linked Policies/Related Documents

Health and Safety at Work etc. Act, 1974
Management of Health and Safety at Work Regulations, 1999
Driving for Work Policy
Health and Safety Policy
Local operating procedures for academic staff

Appendix 1

All requests for overseas travel (ie travel outside the UK) MUST be approved in principle by your line manager and SMT (or Chair BoM) line manager in advance of any hotels or travel being booked.

Traveller Information	
Lead Traveller Name	
Department	
Other People Travelling	
Emergency Contact Number While Overseas	
Name of Your 'Contact Buddy' (This ensures daily contact for safety purposes.)	
Travel Information	
Destination/s	
Departure Date	
Return Date	
Date of Return to Office (If different from above.)	
Purpose of Visit	
Expected Outcome of Visit (Please state the business outcomes expected.)	
Have you drawn up a draft Itinerary? This is Mandatory. (Itinerary must include full contact details of individuals and hotel/accommodation where staying.)	<input type="checkbox"/> Yes - copy of full Itinerary attached, or short trip itinerary noted here below.
Have you checked and shared the Foreign and Commonwealth Office Website for Travel Advice to the Area you are Visiting? This is Mandatory.	<input type="checkbox"/> Yes - checked and no warnings in place. <input type="checkbox"/> Yes - checked and there are warnings in place. (list these below)
Travel Warnings Details	

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Travel Information (continued)	
Have you completed a Risk Assessment? This is Mandatory.	<input type="checkbox"/> Yes - Risk Assessment completed and copy attached.
Insurance and Medical Information	
Travel Insurance: Have you checked with the Property Secretary whether or not you require an increased insurance premium eg for travel to USA.	<input type="checkbox"/> Yes - Have checked and no additional premiums required. <input type="checkbox"/> Yes - Have checked and there are additional premiums (show these in 'Other Costs' below)
If travelling in Europe, have you, and those travelling with you, got a European Health Insurance Card (EHIC)	<input type="checkbox"/> Yes - I, and any staff travelling with me, have an EHIC. <input type="checkbox"/> No - I, and any staff travelling with me, are travelling outside Europe and an EHIC is not required.
Have you, and those travelling with you, arranged to receive, or have already received, the required inoculations for the country you are visiting?	<input type="checkbox"/> Yes - I, and any staff travelling with me, have received the recommended inoculations. <input type="checkbox"/> No - I have not received the recommended inoculations
Estimated Costs – to be updated as required	
Total Cost of Trip (The College covers costs for members of College staff only, and receipts must be provided.)	Hotel Costs
	Flight Costs
	Other Costs
Corporate Gifts	
Do you require corporate gifts?	<input type="checkbox"/> Yes - Contact carolyn.sweeney-wilson.perth@uhi.ac.uk <input type="checkbox"/> No
Approval in Principle	
Do you have Approval in Principle to travel overseas (Attach a copy of the email.)	<input type="checkbox"/> Yes - I have received approval to travel overseas from my line manager, my SMT Line Manager (or Chair of BoM) and attach a copy of the email with this form

Emailing this document acts as an electronic signature and confirms that you have read and understood the terms of the Staff Overseas Travel Policy

Form to be forwarded to your Senior Management Team Line Manager (or Chair of BoM) for authorisation to travel overseas.

Send a meeting invitation to travellers.perth@uhi.ac.uk for the travel dates attaching the following:

Checklist

- This form
- E-mail approval from SMT/BOM
- Draft itinerary
- Personal risk assessment form - Appendix 2

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Appendix 2: Overseas Travel Risk Assessment Form

To be completed by each traveller

Name of Traveller:			
Name of Lead Traveller (if different)			
Destination:			
Date of Risk Assessment:			
For reasons of health, safety and wellbeing you must consider the following issues prior to commencement of your journey.			
Business travel can pose additional risks such as travelling alone, meeting unknown contacts and more reliance on the host organisation. Less experienced business travellers especially may find the list below useful in preparation for the journey ahead. As you know there are various parts of the world where terrorist activity is more prevalent and where natural disasters can have devastating effects. Research your destination.			
Please tick the "Yes" or "No" box as applicable.			
1 Familiarity with Overseas Travel			
1.1	Frequent Overseas Business Traveller	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2 Are you familiar with Country's:			
2.1	Transport Infrastructure	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.2	Customs and Cultures	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.3	Temperature	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.4	Humidity	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.5	Food	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3 Contacts with Host Organisations			
3.1	Are all the contacts being met known to Perth College UHI?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.2	I am aware of the arrangements for being met in-country	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4 Fitness to Travel			
4.1	I am fit to travel and have no disability or pre-existing medical condition(s)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2	I have had all recommended inoculations	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Send a meeting invitation to travellers.perth@uhi.ac.uk for the travel dates attaching the following:

Checklist

- This form
- E-mail approval from line manager

Please also send to the International and Corporate Services Director if any No boxes are ticked.

Emailing this document acts as an electronic signature and confirms that you have read and understood the terms of the Overseas Staff Travel Procedure.

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Appendix 3: Overseas Travel Risk Assessment Guidance Notes

1.0	Familiarity with Overseas Travel	Associated Risk	Control Measures
1.1	Frequent Overseas Business.	Deep Vein Thrombosis. Jet lag. Aircraft air conditioning (long haul) causing infection. Ergonomics (type of seating).	Avoid sitting too long, take regular gentle exercise, use support stockings when appropriate and keep hydrated.
2.0	Are you Familiar with Country's:		
2.1	Transport Infrastructure.	Volume of traffic, noise, language barrier, risk to personal safety or lost sense of direction. Stress.	Advance information from host. Use transport recommended or provided by host. Be accompanied if possible.
2.2	Customs and Culture.	Causing offence. Breaking the law.	Take advice from host. The Foreign and Commonwealth Office website gives information on culture customs, travel etc. Before visit read literature pertaining to country.
2.3	Temperature.	Exceptional cold weather – hypothermia. Very hot weather – dehydration.	Check the seasonal weather within the country and dress/hydrate accordingly.
2.4	Humidity.	Heat stroke, headache or fatigue.	Keep hydrated and take advice from host.
2.5	Food.	Unfamiliar food, sickness, diarrhoea.	Take advice from host.
3.0	Contact with Host Organisation	Loss of contact with host organisation or any group member.	Ensure every member of the group has all contact numbers/addresses readily available for host and group members.
3.1		Not being met at the airport, unaccompanied trips in unfamiliar environment, accompanied by unknowns.	Ensure you know who is to meet you on arrival and what the travel arrangements are.
4.0	Fitness to Travel		
4.1	Disability or Medical Conditions.	Slips, trips or falls, pulled muscles, loss of medication, delay in receiving medical assistance.	EHIC card. Contact details of local British Consul/Embassy and international hospitals. Adequate supply of medication and doctor's letter for further supply if required.
4.2	Vaccination.	Prevalence of disease.	Inoculation and preventative medication or measures, check with your GP and FCO in advance.

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Appendix 4: Frequently Asked Questions

Q: When does travel insurance apply?

A: Cover applies to all overseas travel.

Q: What am I covered for?

A: For overseas travel you are covered for cancellation, medical expenses, personal accident, loss of personal effects and legal liability.

Q: Are there any occasions where I am not covered under travel insurance?

A: An obvious hazardous activity and travel to areas where FCO (Foreign and Commonwealth Office) has advised against all travel or all non-essential travel.

Q: During my stay abroad I have the opportunity to participate in an activity which is different to my normal work. Will I be covered?

A: Any activity which may be deemed to be hazardous must be notified to the Property Secretary prior to travelling. Extended cover may be available depending on the circumstances.

Q: Do you have any information that I can take with me?

A: The Property Secretary can provide you with an emergency contact telephone number and a copy of the Summary of Cover for the College travel insurance.

Q: How do I make a claim?

A: The Property Secretary must be advised as soon as is practicable of any potential claim, and will assist in completing the necessary paperwork.

Q: How much will I receive if I make a claim?

A: The amounts vary depending on the type of claim. You must note however that this is a College insurance policy and any payment will be made to Perth College UHI.

Q: My house was broken into whilst I was away on College business. Can I claim under the travel insurance policy?

A: No, you would need to claim under your own house insurance.

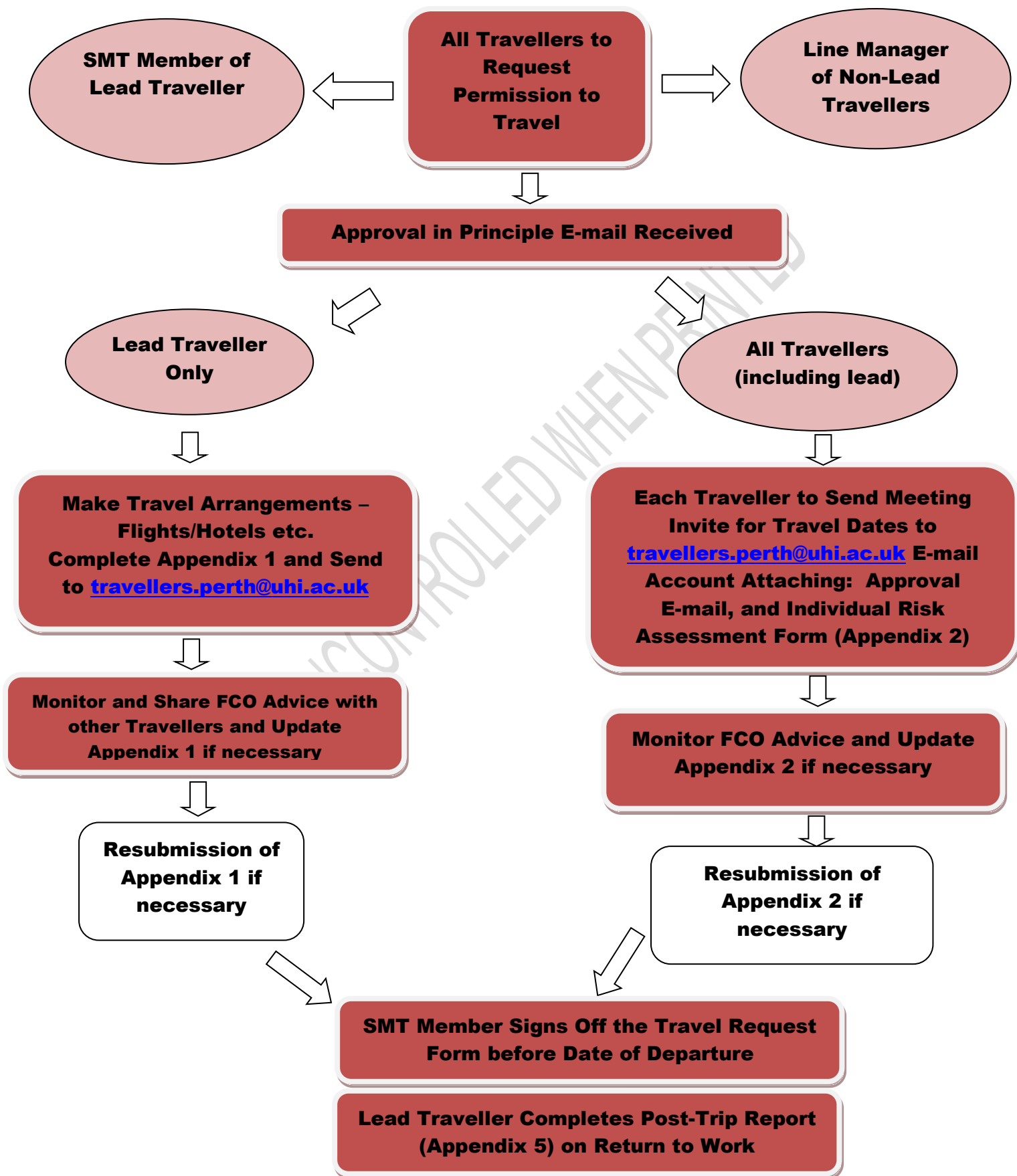
Q: I still have a question that is not covered in this information. Who do I ask?

A: Please contact the Property Secretary, extension 77330 or email june.wilson@perth.uhi.ac.uk for further assistance.

Appendix 5: Post-Trip Report

Traveller Information	
Lead Traveller Name:	
Department:	
Telephone No:	
Other People Travelling:	
Place Visited:	
Purpose of Visit:	
Name/Type of Accommodation:	
Departure Date:	
Return Date:	
Did the Visit Meet Your Expectations (if not, why not) eg accommodation, travel arrangements, contact buddy etc.	
Signature:	
Date:	

Appendix 6 – Procedure



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