

Quick Guide

Going on a business trip

Why it matters...

The university has a duty of care to ensure its staff are safe and well prepared when undertaking work related trips.

The University is accountable to all of its stakeholders, to ensure that the funds it holds are spent only in the furtherance of its aims.

Being prudent with this type of expenditure will allow us to maximise our funds in delivering the best University experience to students.

What do I need to do?

Check policy and guidance documents to see what rules must be applied and what costs are permissible.

Check your budget to ensure you have sufficient funds for all elements of the trip.

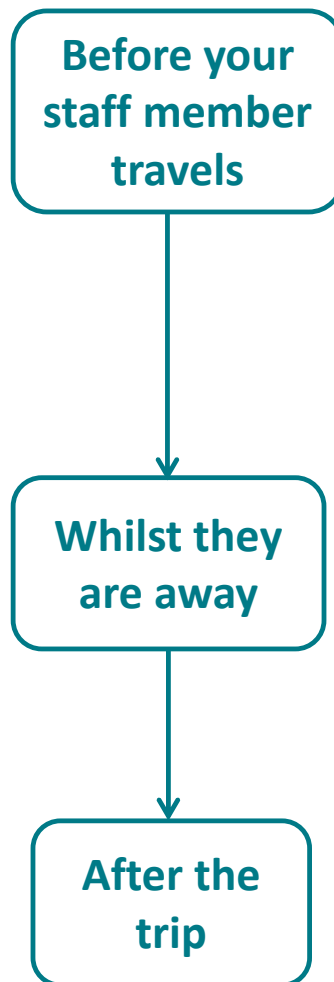
Use the University's [designated travel providers](#).

Complete the travel application and risk assessment forms (the latter for [high risk locations](#) and/or activities) and notify the Tax and Insurance Analyst of the results at least two weeks before travel.

Advise the traveller to consult their GP about [vaccinations](#) etc.

Check claims to ensure that they are correct and properly supported by receipts etc.

How it works



- Staff submit a request to travel form.
- Authorising manager checks budget, assesses risks and gives approval.
- Department books travel and accommodation.
- Staff member may make request for cash advance.
- Be aware of political or environmental developments that may affect staff travelling.
- Staff should be aware of the University [subsistence rates](#) for their country of travel
- Staff can use the online expenses system or a paper claim form to claim their incidental expenses, such as food or car parking costs.
- Supporting receipts must be scanned in to the system or retained by the claimant or REO (for all research related expenditure).
- Make sure that the correct cost and account codes are used for each element of the claim.

Quick Facts

- The Financial Regulations and supporting documents are the University's default position for expenses, any stipulations set out by funding bodies will be in addition to our regulations.
- There is no need for staff to incur travel or accommodation costs, the University has providers in place for this.
- Staff can request a cash advance (one weeks notice required), if they are travelling away for extended periods or face particular financial hardship; contact the [Payments Team](#) for further information..
- Frequent travellers may request to be issued with a [corporate credit card](#).
- The University has comprehensive [travel insurance](#) in place, the [Tax and Insurance Analyst](#) can advise further on this.
- Finance reserves the right to decline payment of claims which in its estimation are not in compliance with regulations, are improper or unsupported.

Useful links and Guidance

- Financial Regulations, Financial Procedure Notes and supporting guidance can be found on the [Finance SharePoint](#).
- The main documents dealing with travel related expenses are:
 - [Financial Regulations](#) – Section 13
 - [FPN 1](#) – Expenses Policy
 - [FPN 4](#) – Subscriptions and Personal Benefits
 - [FPN 6](#) – Travel Related Expenses
 - [FPN 7](#) – Subsistence and Hotel Accommodation
 - [FPN 8](#) – Long Term Accommodation Related Expenses
 - [FPN 9](#) – Entertainment, Hospitality and Gifts
- Advice can be sought from your Departmental/School Finance Officer, Departmental/School Manager, Professional Services/Faculty Accountants or the Senior Financial Analyst (Quality Assurance).

Common questions

- **Do I have to use the designated travel providers?**

Yes you do, the use of these providers has been made mandatory by USG and the Registrar & Secretary. STA operates a price matching policy, as well as giving the University a number of facilities that are not available to staff when booking privately. If you experience difficulties with these services, please contact our colleagues in [CPU](#).

- **The guidance available does not answer my query, who can help me?**

Please contact the [Senior Financial Advisor \(Quality Assurance\)](#), who will look in to the situation and make a decision on how to proceed.

- **Why has Finance queried a claim I have approved?**

There can be occasions when Finance believe that University regulations may have been incorrectly applied. Finance has a duty to ensure that University funds are spent properly, but we will do our best to work with you to find a remedy that is fair and proper to the claimant and the University.