Travel Approval

User Reference Guide

Version 1

November 2014
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INTRODUCTION

The new Travel Approval process aims to automate, streamline and simplify the existing process for the application and approval of travel requests. Currently this process is undertaken through the completion of up to 10 paper based forms, with multiple manual delegation signoffs and submissions.

How will it improve our services

The Travel Approval process uses systems integration and workflow technology to route data from and to systems, automatically retrieve delegation information, trigger emails for delegation approvals, produce summary reports for records retention and address reporting needs.

The new process will replace the current complex manual process with a streamlined, fully-digitised solution and seamlessly integrate technology bringing separate information silos together into a centralised location.

eForms system

The Travel Approval form is the first of the eForm suite of reports being developed. As administrative processes are streamlined they will be offered as an eForm. The Travel Approval system has been developed using Infiniti software (an Intelledox flagship software solution). Infiniti is an easy-to-use product which does not require its users to have any specialised skills.

What’s involved?

The Travel Approval system can be accessed through the ANU website via the Staff page as shown below:

Accessing off campus

If accessing the eForms system off-campus, the user should be able to access the Travel Approval by clicking on the eForms -Travel logo on the staff page.

Should there be any connection problems it might be necessary for the user to first connect to the ANU Virtual Private Network (VPN) before opening the eForms system.

For assistance on setting up the VPN go to the ANU ITS VPN page: http://itservices.anu.edu.au/it-security/vpn/.

What you need to know

The eForms system enables a user to create and track the progress of a submitted travel approval request, and access historical forms which can be used as the base for new requests. The new Travel Approval system will replace all existing paper based forms and staff will need to use the new system for the application and approval of travel requests.

User Reference Guide

The purpose of this user reference guide is to give the user detailed step-by-step instructions on how to use the Travel Approval system.

The User Reference Guide

This User Reference Guide has 6 Sections:
SECTION 1 – ACCESSING THE ONLINE TRAVEL APPROVAL SYSTEM
This section steps how to access the online Travel Approval forms.

SECTION 3 – STEPPING THROUGH THE TRAVEL APPROVAL PROCESS
This section steps through the information in the forms, providing a guide on how to interpret the fields and complete each section.

SECTION 3 – APPROVAL PROCESS FOR DELEGATES
This section shows the process for supervisors and delegates on approving or amending a submitted form.

SECTION 4 – GLOSSARY OF TERMS
Explanation of terms used in the Travel Approval form.

SECTION 5 – GETTING ASSISTANCE
This section shows how and where to obtain assistance with completing your form.
SECTION 1 - ACCESSING THE ONLINE TRAVEL APPROVAL SYSTEM

The eForms system has been developed to accommodate additional forms developed within ANU as part of the streamlining of administrative processes. Travel Approval is the first of these eForms.

Once the Travel Approval system goes live, a link will be available through the ANU website via the Staff page as shown below:

Accessing the forms off-campus

If accessing the eForms system off-campus, the traveller should be able to access the Travel Approval by clicking on the eForms -Travel logo on the staff page.

Should there be any connection problems it might be necessary for the user to first connect to the ANU Virtual Private Network (VPN) before opening the eForms system. : http://itservices.anu.edu.au/it-security/vpn/.

Logging in to the eForms system

Enter your normal University User ID and password into the eForms login page as show below and click on the Login button.

If you are experiencing issues logging in to the eForms system please contact the helpdesk on:

Email: travel.approval@anu.edu.au
Phone: +61 2 6125 4321 (Option 1 then option 6)
After signing-in to the eForms system, the user will be directed to the eForms home page as shown below:

The home page consists of the following sections:

**Forms Assigned to Me**
- Lists all forms allocated to the user, including any previously saved forms (e.g. Travel Approval - Travel Request) and forms assigned to the user for approval as a supervisor or delegate (e.g. Travel Approval - Supervisor Endorsement). If there are no saved or allocated forms, this section will not be shown.

  - Once a traveller submits a request for approval the form will disappear from the users list, as it is now allocated to the approving supervisor, so cannot be viewed or edited until returned to the user, either after approval has been granted or if it is returned to the traveller for any reason (e.g. for clarification).

**Begin a New Form**
- Lists current forms that can be completed via the online system. As administrative processes are streamlined using Infiniti software, they will be offered as an eForm and will appear on the forms list.

**Form Activity**
- The Form Activity page can be accessed by clicking on the Form Activity link in the top banner as shown below:

  On this page a user can view all the historical forms that have been assigned to the user. Further information can be found on the following page.
Form Activity page

The Form Activity page can be accessed from the eForms home page and contains a list of all forms that have been created by or assigned to the user.

If a form is currently active and assigned to the user, the Form name will be shown in green and can be clicked on to access the form.

<table>
<thead>
<tr>
<th>Form Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form</strong></td>
</tr>
<tr>
<td>Travel Approval</td>
</tr>
<tr>
<td>Travel Approval</td>
</tr>
<tr>
<td>Travel Approval</td>
</tr>
<tr>
<td>Travel Approval</td>
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<tr>
<td>Travel Approval</td>
</tr>
<tr>
<td>Travel Approval</td>
</tr>
<tr>
<td>Travel Approval</td>
</tr>
</tbody>
</table>

To view the full history of a Travel Approval, click on the History icon ![History Icon] next to the form. The following page will be displayed, showing the various stages an approval has progressed through. In the example shown below, this form has been signed off by the supervisor and is currently assigned to the Domestic Delegate for approval:

<table>
<thead>
<tr>
<th>History - Travel Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State</strong></td>
</tr>
<tr>
<td>Travel Request</td>
</tr>
<tr>
<td>Supervisor Endorsement</td>
</tr>
<tr>
<td>Domestic Travel Request Approval</td>
</tr>
</tbody>
</table>
Create a new Travel Approval request

**STEP 1** Click on the Travel Approval link to start a new Travel Approval request.

* or

Click on Travel Approval Using Previous to use a completed past travel approval to prepopulate the form.

- Any past travel forms that have been completed fully (including Post Travel forms submitted), can be used for future travel approvals by the traveller.
- Click on the down arrow to select from available forms (if any).
SECTION 2 - STEPPING THROUGH THE TRAVEL APPROVAL PROCESS

Navigating the forms

**Navigation panel**
The panel on the left of each page enables tracking of progress through the form and allows user to step directly to a particular section. Each time the user navigates off a page it will validate (confirm) the information required is provided. If the information is complete, it will show as green, and if there is still key information to be added, then it will show as pink (as shown above). The active page will show as blue. A form cannot be submitted while any of these sections are red.

**Action buttons**
- **Save button** 📝
  - Click to save progress and enter a name for the form, which will be shown when next accessing the home page.

- **Navigation buttons** ⬅️ ➡️
  - Steps forwards/backwards through the pages of the form.

**Home**
- Click Home to return to the eForms Home page that lists current forms. Any progress that has not been saved will be lost.

**Log Out**
- Click Log Out to exit out of the eForms system. If progress has not been saved, when next logging to the system, the user will be asked if they want to continue with the previous document.

**Required fields**
- Fields marked with * are compulsory fields. The form cannot be submitted until all required fields are completed.

**Dropdown arrows**
- Click on a dropdown arrow 📌 to select from a list of available options.

**Note:**
If a form was started in a previous session but the window was closed or user clicked Logged Out without clicking on Save, the following dialogue box will appear the next time the user logs in. This will give the user the option to continue with the previous document, however, this option is not available if the user clicked Home without saving - the data previously entered will be lost.

- Click **OK** to open unfinished document.
- Click **Cancel** to remove previous session’s data and start over.
Help

Some fields on the form will have a Help icon, which will provide additional information relating to a particular field. Click on the icon to display help text. Click on Close Help in the bottom right to exit.

Online help and other useful links can be found on the F&BS Travel Website.
General Travel Information

The first page to complete on the Travel Approval form is the General Information page.

**STEP 2** Click on the **ANU Role** dropdown to select the relevant role.

- Some University IDs may be associated with different roles (e.g. student, staff), so select the role applicable to the travel being requested.

**STEP 3** Enter the start and end dates of travel by clicking on the Calendar icon and selecting the relevant date. Alternately, enter the date directly into the text field in the format DD/MM/YYYY:

- **Travel Date From:** commencement date of travel
- **Travel Date To:** arrive back from travel date

**Note:** The total number of days are calculated automatically from the dates provided. Check this matches what was expected.

**STEP 4** Enter a short explanation of the purpose of travel (e.g. Administrative Conference in Sydney). This information will be used as the save name for your form.

**STEP 5** Click on the acknowledgement to verify that you have not been certified as unfit to travel by a medical practitioner.

- Anyone travelling for ANU must be deemed “fit to travel” to be covered by the ANU travel insurance policy. Refer to the ANU Insurance Manual for further information.

*Click on the right arrow to navigate to the next section of the form. If there are errors on the page, the form won’t progress. See next page.*
Note: Each time the user navigates to another page using the button, the page is validated (checked for errors). If there is an error on the page, the form won’t progress and a validation error will be shown as per the example below:

- I certify that I am fit to travel and have not been declared unfit to travel by a Medical Practitioner.
- This is a required field

To move forward without resolving validation errors at this time, click on the next section via the left navigation menu. The page with errors will show in pink (as shown below) and the form cannot be submitted until all validation errors are fixed.

See the Validation Errors section of this user guide for more information.
Purpose of Travel

The Purpose of Travel section looks at more detailed reason(s) for the travel request. This page also flags HR related factors that may need to be addressed.

**STEP 6** Click on the all relevant travel purpose(s) checkboxes that relate to the travel being requested.

**STEP 7** For each Purpose of Travel checkbox ticked, provide additional details (e.g. the name of the event) in the applicable space(s) provided.

If *Fieldwork* is selected, additional sections will become visible that are required to be completed. Further details on these extra sections can be found in this guide.

Some questions vary on this page depending on whether the role selected on the previous page is as staff or student.

**Staff page**

**STEP 8** Staff must answer the following HR related questions:

- Do provisions need to be made for the continuation of the traveller’s duties in their absence?
- Does an absence/timesheet proxy (i.e. allocate timesheet and absence approval to another staff member) need to be setup? Clicking ‘Yes’, which will display a link to the ANU HR & Student Administration system.

**Note:** These questions are only intended as a prompt for the traveller or supervisor to take action. Clicking ‘Yes’ will not put into place the necessary arrangements, which are done independently of Travel Approval form.
Student page

STEP 9 Students must answer the following student related questions:

- Enter program plan
- If applicable, has your program leave been approved?
- Are you under a Scholarship? If yes, enter name of scholarship

*Click the right arrow to navigate to the next section of the form.*
Travel Plan

The Travel Plan page requires a dissection of intended travel period into different segments. This is for the calculation of Fringe Benefits Tax (FBT), therefore it is not required that a full itinerary is provided.

Travel Segments

**STEP 10** Enter the dates of travel for the first travel segment or destination

- **Travel Date From** is the date travel will commence. This date must match the ‘Travel Date From’ shown at the top of this page (previously entered on General Travel Information page).

- **Travel Date To** is the date this segment of travel will end. If only travelling to a single location, the date must match the ‘Travel Date To’ shown at the top of the page.

**Note:** The Calendar icon is used throughout the form. Click on the calendar icon and select the date or alternately enter the date directly into the text field (DD/MM/YYYY)

For instructions on adding additional segments, refer to the Adding, deleting and moving travel segments section of this user guide.
**STEP 11** Enter the type of travel by clicking on the icon and selecting the relevant option.

![Travel Plan interface](image)

All travel days must be accounted for in the Travel Plan, and cannot overlap. If travelling to more than one destination on a single day, select the trip type based on how you will spend the majority of your time using the following trip types:

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business</strong></td>
<td>An activity undertaken by an employee (i.e. attendance at a meeting, attendance at a conference, field research, speaking at a lecture) having a duration of more than three hours, that relates to their work as an ANU employee.</td>
</tr>
<tr>
<td><strong>Transit</strong></td>
<td>A day in transit that does not allow for the day to be a business day due to transportation from one destination to another. The first 2 days to any destination that is greater than 12 hours flying time will be considered days in transit.</td>
</tr>
<tr>
<td><strong>Private</strong></td>
<td>The number of days that are not business days, days in transit or unavoidable delays.</td>
</tr>
<tr>
<td><strong>Special</strong></td>
<td><strong>Consideration</strong> Days Additional days approved by the travel delegate in circumstances where the traveller requires additional days for recovery due to health and safety.</td>
</tr>
</tbody>
</table>

**Note:** Where there is more than one relevant type associated with the requested travel period, add each type in as separate segment by clicking on the icon. For example: if taking an extra day for personal purposes (e.g. sightseeing etc.), include one segment for business and another for the personal component.

For more information, click on the help icon 📚.

**STEP 12** Select whether the destination for this segment is Domestic or International.

![Destination selection interface](image)

**Note:** Returning to Australia from overseas travel is considered a domestic segment even though departing from an international location, as the destination is a domestic location. For flights under 12 hours to an international location, a single international segment may be used (e.g. Segment 1: International – Auckland for the full travel time).
Domestic Travel

A domestic travel segment is where the destination is an Australian location, regardless of the departure country.

STEP 13 Click on the dropdown arrow and select the destination state (e.g. NSW), then type the city/town name (e.g. Sydney).

STEP 14 Enter any known ‘Mode of Travel’ information (e.g. flight, hire car, research vessel).

International Travel

International travel segments are completed in a similar way to domestic travel, however, some additional information is required. An international travel segment is where the destination is an overseas location. If there is an Australian leg on an international flight, it is not necessary to include a domestic segment first. Remember however, where the flying time is greater than 12 hours, the first segment must be an In Transit segment.

STEP 15 Enter the destination country. Auto-fill is enabled in this field, so type few letters of the country name and a list of possible destinations will appear that you can select.
The travel form is linked to the Department of Foreign Affairs and Trade (DFAT) travel advice, to provide travel warnings (risk ratings) to the selected country as shown in the examples below:

If travelling to a location where the risk ratings vary for different regions in that country, then the region will need to be selected in order to apply the appropriate risk rating.

Travelling to countries with a DFAT Risk Rating of 3 or 4 will trigger an additional section to be completed on the Travel Approval form. See the Travelling to High Risk Destination section of this guide for more information on traveling to high risk areas.

**STEP 16** Enter the destination city/town/province.

**STEP 17** Enter any known ‘Mode of Travel’ information (e.g. flight, hire car, research vessel).
Adding, deleting and moving travel segments

<table>
<thead>
<tr>
<th>Add</th>
<th>To create an extra travel segment, click on the add icon at the bottom of the Travel Segment box.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>To remove a segment, click on the checkbox □ next to the segment to be removed, and click on the Remove icon.</td>
</tr>
<tr>
<td>Reorder</td>
<td>To reorder segments, click on the Reorder icon and hold the mouse button down, while dragging into the correct position.</td>
</tr>
</tbody>
</table>

Remember, the all travel days specified on the General Travel Information page must to be accounted for in the Travel Plan, and cannot overlap. Information on this page is an overview of intended travel and is not a full itinerary. Refer to Step 11 for further information about the various trip types.

Declarations

**STEP 11:** Advise the nationality of the passport to be used for this trip, then read and check the related travel declarations to acknowledge and agree to requirements.

- **Travelling on an Australian Passport**
  
  ![International Travel Declarations](image)

  If travelling on an Australian Passport, click on the Australian Passport option, then read and check the acknowledgments:

  - ANU travellers are required to register with DFAT prior to the trip and continue to monitor for any changes to the risk rating. These acknowledgments must be checked before continuing with the Travel Approval form.

- **Travelling on a non-Australian Passport**

  ![International Travel Declarations](image)

  If travelling on a non-Australian Passport, click on the non-Australian Passport option, then list the passport(s) the traveller will be using, and read and check the acknowledgment:

  - ANU travellers are required to register with their relevant agency prior to the trip (where relevant). This acknowledgment must be checked before continuing with the Travel Approval form.
Travelling to High Risk Destination

When specifying a country on the Travel Plan page that has a DFAT Risk Rating of 3 or 4, an additional page is triggered which will need to be completed on the Travel Approval form.

Any proposal to visit a High Risk Destination must include risk assessment that addresses the potential risks and the means by which each level of risk will be reduced.

**STEP 19** Read and check the declarations to acknowledge and agree to requirements for travelling to High Risk Destinations.

- It is important to read the DFAT Travel Advice before completing the risk assessment, as this will alert the traveller to potential risk associated with travelling to the intended country that should be addressed in risk assessment.
STEP 20 Provide details of an emergency evacuation plan should withdrawal from the High Risk Destination become necessary while travelling. Sample below:

**Evacuation Strategy**

The Traveller will: **{HOW WILL THEY ENSURE CONTACT IN CASE OF AN ESCALATION OF THE SECURITY SITUATION} eg. register local telephone or mobile phone number with the Australian Embassy in the area**

Should the need to evacuate arise, the Traveller will: **{WHAT WILL THEY DO?}** Eg.
- Advise the **{AU Officer}** that an evacuation is to take place.
- Make and maintain contact with Australian Embassy staff to determine the status of travel to the airport and any other relevant security or evacuation information.
- Make contact with **{Airline}** and change flights. A flexible flight has been booked for this reason.
- Travel from the Hotel (or whichever location) to the airport would be taken with the utmost caution and with the most secure transport available.
Fieldwork

An ANU requirement of undertaking fieldwork is that a detailed Fieldwork Assessment and Risk Assessment be completed for the intended travel.

STEP 21 Read the [ANU Procedure on Fieldwork health and off-campus work safety](#) and tick the checkbox confirming traveller will adhere to this policy while on fieldwork.
General fieldwork information

**STEP 22** Select whether there are any pre-existing medical conditions that may affect ability to undertake fieldwork

If yes, when appropriate:

- complete a risk assessment to show where controls to mitigate/minimise risk have been considered.
- discuss matter with the Fieldwork Supervisor, and, if deemed necessary, obtain a medical management plan from the doctor to assist with appropriate treatment and safety in the field.

**STEP 23** Select whether traveller is the trip leader/supervisor (includes those travelling alone).

If yes, complete the additional trip leader information:

- Indicate if travelling alone or with other people on this field trip
  - Trip leaders travelling with others must provide details such as name and University ID as requested.

- In some instances, a first aid kit and person(s) is a fieldwork requirement. Please refer to the [ANU Procedure on Fieldwork health and off-campus work safety](#) for further information.

**STEP 24** Indicate if there will be any camping undertaken on this trip

- If yes, include and details known about the site
STEP 25 Indicate if there will be any diving equipment used on this trip.

- If yes, contact the responsible Diving Safety Officer or WHS team, who will advise of additional requirements and insurance implications.

<table>
<thead>
<tr>
<th>Will scuba diving equipment be used during this field trip? *</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes</td>
</tr>
</tbody>
</table>

Please contact your local Diving Safety Officer for further details of what additional documentation is required.

STEP 26 If there is another organisation responsible for the field trip, the following details must be provided.

<table>
<thead>
<tr>
<th>Is another organisation managing this field trip? *</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes</td>
</tr>
</tbody>
</table>

Name of the organisation *

Name of organisation’s primary contact *

Organisation’s primary contact email *

Organisation’s primary contact phone number *

Attach a copy of the fieldwork risk assessment that has been prepared by the organisation that is managing this fieldtrip here.

Upload Here

Contacts and Locations

STEP 27 Provide all available contact and location details for the fieldwork site as requested.

Contacts and Locations

Where applicable provide: all personal mobile numbers, accommodation phone number(s), research station address, research station/host organisation contact name(s) and phone number(s), local contact name(s) and phone number(s).

Where applicable provide: address and contact details of local police, hospital or other local emergency services in the immediate area(s) in which you’ll be working.

Where applicable provide: exact fieldwork location in which you’ll be working.

Latitude

Longitude

Fieldwork declarations

STEP 28 Carefully read the fieldwork declarations and the tick the checkbox to agree.
Risk Assessment

A risk assessment is a requirement of field trips and when visiting High Risk Destinations. Travellers are must identify potential risks, controls to manage the risk, and then assess the likelihood/consequence of the risk if those controls are in place.

Some risks are dependent both on the individual characteristics of the traveller (language competence, experience, gender, ethnicity, religion, nationality and sexual orientation) and on circumstances in the destination country. Risks may include:

- disease
- misadventure (including traffic accidents, natural disasters, and extreme climatic conditions)
- harassment (including physical attacks, extortion and arrest by authorities)

**STEP 29** Select all the relevant hazards that apply to the requested trip.

- If the hazard to be completed does not fit into one of the hazard options, select Other and enter a description of the hazard in the text box.

- Additional potential risks for a high risk country can also be found on the DFAT website.

**STEP 30** Describe the risk that may result from the selected hazard (some examples are provide at the end of this section)

**STEP 31** Click on the dropdown arrow to select the likelihood and consequence of this risk.

**Likelihood:** probability of something happening and the frequency with which it happens, and

**Consequence:** the outcome and impact of an event if it occurs.
**STEP 32** Provide a control measure to eliminate or reduce the risk.
- Enter as many controls as required for each risk by clicking on the ⚪️

**STEP 33** Once all the above controls are implemented, indicate the remaining risk.
- Residual risk rating should be less or, at the very least, no worse than the initial risk rating.

---

**Examples of completed risk assessments:**

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**Weather Conditions**

- **Description of Risk**: Getting lost or injured in a remote region in China and not being able to seek help.
- **Likelihood of Risk**: Possible (2) - Might occur at some time
- **Consequence of Risk**: Catastrophic (4) - Multiple Fatalities
- **Risk Rating**: High 6 - Please see Risk Ratings Details.

---

**Flora and Fauna**

- **Description of Risk**: Malarias from mosquito bite
- **Likelihood of Risk**: Possible (2) - Might occur at some time
- **Consequence of Risk**: Major (3) - Intensive injuries / possible multiple
- **Risk Rating**: Medium 6 - Please see Risk Ratings Details.

---

**Risk Controls**

- **Control 1**: Ensure preventative medications are taken
- **Control 2**: Wear mosquito repellent at all times
- **Control 3**: Sleep with a mosquito net

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**Residual Risk**

Please reassess the Likelihood and Consequence ratings to determine the remaining risk after the risk controls have been implemented.

- **Residual Likelihood**: Unlikely (1) - May only occur in exceptional circumstances
- **Residual Consequence**: Major (3) - Intensive injuries / possible multiple
- **Residual Risk Rating**: Medium 3 - Please see Risk Ratings Details.
Emergency Contact

**STEP 34** Enter details of how the traveller can be contacted while travelling.

In case there is a need for urgent contact, also include details of:

- accommodation and/or other emergency instructions; and
- other contact persons that may be with onsite with the traveller by clicking Yes to include additional contacts.

**STEP 35** Ensure emergency contact details are updated on HORUS/ISIS and click on the acknowledgement.
Travel Budget

The Travel Budget page allows anticipated travel expenses to be assigned one or more parties.

STEP 36 Select one or more funding sources for the travel:
- **Funded by ANU:** Expenses to be covered by ANU
- **Funded by a third party:** Expenses will be paid by an external party
- **Privately funded:** Expenses to be paid by the traveller

STEP 37 If **Funded by ANU** option was selected, complete the details of anticipated expenses:
- Select the type of expense (e.g. accommodation, airfare, conference fees, taxis etc.)
- Select how the expense will be paid (e.g. ANU purchase card, payment to supplier, reimbursement etc.)
- Enter the estimated expense amount in whole dollars
- Click on the + icon to add additional expenses

**Note:** Selecting a per diem payment type will trigger the per diem calculations page to be completed.

STEP 38 Enter details of privately or third party funded expenses

**Per Diem and Cash Advances:**
Any per diem and/or cash advance requests will be automatically sent to finance for processing and payment once the travel has been approved.
General Ledger Codes

The General Ledger Codes page assigns the travel expenses to a department and project.

**Note:** The General Ledger Codes can be left blank if not known, however, the approving supervisor will need to complete this section before it can be progressed.

Alternate names across ANU for the General Ledger Code are: GLC, Budget Code, Budget, Chartfields Structure, Chartfields, Account

**STEP 39** Enter the relevant ledger codes for department responsible for the travel expense(s) and the amount to be allocated. If the expense is to be split across numerous codes, click on 🔄 to add additional codes and expense amounts.

- The Unallocated Expenses should equal AUD$0 once all amounts have been allocated to a project.
Pre Travel FBT Estimation

**Private component on an ANU business trip**

If a private travel component will be taken as part of this trip, an estimate of FBT will be calculated. The information on this page is based on dates of private travel segments entered into the Travel Plan.

Where the personal component is greater than 40%, the traveller is required to contribute to the cost. An estimated amount owed by the traveller is calculated below:
Per Diem Calculations

The Per Diems Calculations page(s) are activated when a Payment Type of Per-Diem is selected on the Travel Budget page as shown below:

The relevant international and/or domestic per diem page is triggered based on the segments entered into the Travel Plan (i.e. if there are only domestic segments added, then only the Domestic Per Diem Calculations page will appear).

**Note:** The per diems calculations on the Travel Approval form are determined by the ATO.

**Domestic per diem calculations**

**STEP 40** Click on the dropdown and select the relevant salary range.
STEP 41 Select the intended departure information:

- **Departure Time**: select from a time range in the drop down. Air travel: add 1 hour before flight for capital cities, and 30 minutes before flight for country areas. Other travel: use the actual planned departure time.

- **Departing From**: select the destination type as determined by the ATO (e.g. Capital City, High Cost Country Centre). Click on the link at the top of the page for a list of domestic high cost country centres.

- The calculated amount to be paid for the day of departure is calculated and stated in the **Allowance on Departure Day** field, which will be added to the amounts calculated for the remainder of the trip to reach a total allowance amount.

STEP 42 Enter the number of intended nights to be spent at various destination types

- This will calculate the amount to be paid for meals and incidentals for each night away.

![Complete Days Absence](image)

**Nights in capital cities and high cost country areas**: 1

**Meals/Incidentals**: $410.20 / $74.80

**Nights in other areas**: 2

**Meals/Incidentals**: $186.80 / $37.40

STEP 43 Select the intended return information:

- **Return Time**: select from a time range in the drop down. Air travel: add 1 hour after flight arrival for capital cities, and 30 minutes for country areas. Other travel: use the actual planned return time.

- **Returning From**: select the return destination type as determined by the ATO (e.g. Capital City, High Cost Country Centre).

- The calculated amount to be paid for the day of return is calculated and stated in the **Allowance on Return Day** field.

STEP 44 Copy the calculated Grand Total amount to the Travel Budget page in the per diem miscellaneous expense amount field.

![ATO Approved Reasonable Amounts](image)

**Total Domestic Travel Meal Allowance Amount**: $723.10

**Total Domestic Travel Incident Allowance Amount**: $112.2

**Grand Total**: $840.30

![ANU Funded Travel Expenses](image)

**Airfare - Domestic**: $400

**Miscellaneous - Travel**: $840

- The amount can be adjusted if appropriate, however, if this amount varies from the ATO specified amount, provide details in Funding Comments field.
International per diem calculations

STEP 45 Click on the dropdown and select the relevant salary range.

STEP 46 Select the destination country from the drop down list and the number of nights in that country.

- If travelling to multiple countries, add additional locations using the button.

**Note:** The list of countries is specified by the ATO. If the relevant country is not listed, select Other. (NB: China includes Hong Kong and Macau)

STEP 47 Copy the calculated Grand Total amount to the Travel Budget page in the per diem miscellaneous expense amount field. If there is also a domestic per diem calculation, sum the two amounts.

- The amount can be adjusted if appropriate, however, if this amount varies from the ATO specified amount, provide details in Funding Comments field.

Per diem declaration

STEP 48 Read and agree to the declaration stating the requested amount is not greater than the ATO amount.

**Note:** Once travel has been approved, the per diem information from the Travel Approval form will be provided to finance for processing and payment of per diem allowances.
Supporting Documentation

If you have any documents supporting your travel, such as a conference timetable or presentation, they can be attached to the travel application.

**STEP 49** To add supporting documentation for your travel:

- Click on the **Upload New** button which will open a dialogue box as shown below:

  ![Upload Dialogue Box](image)

- Click on **Browse** to select a file to upload from your computer (any document type is accepted)
- Click on **Start upload** to save your document to the system
- Write a **brief description** of the uploaded file in the ‘Description or Comments’ fields
- To attach additional documents, click on + and repeat the process

**STEP 50** Enter any other information to include in the Travel Approval form.
Approving Supervisor

The final sections of the Travel Approval form are for approval. These dropdown lists are populated directly from the HR database and cannot be modified via the Travel Approval system.

**STEP 51** Click on the dropdown arrow to select your supervisor and their role.

- If this information is inaccurate or the dropdown list is empty, please contact HR to update employee record.

**STEP 52** If travelling for the Research School of Biology or Fenner School of Environment, click on the dropdown arrow to select the relevant email, otherwise leave blank

- By selecting the relevant school’s email address, an email will be sent to the Fieldwork Manager responsible for that school.

*Note:* The Fieldwork Manager Notification will only be visible if Fieldwork is selected on the Purpose of Travel page.
Approving Delegates

STEP 53 Click on the dropdown arrows to select relevant delegates for approval:

- **Domestic Delegate:** Person within a Division/Department who has been assigned authority to approve domestic travel (Delegation 199) on the HR database.

- **International Delegate:** Person within a Division/Department who has been assigned authority to approve international travel (Delegation 198) on the HR database.

- **High Risk Destination Delegate:** Person within a Division/Department who has been assigned authority to approve travel to high risk destinations (Delegation 198), with approval from the Vice Chancellor.

**Note:** Only in exceptional circumstances will staff and students be permitted to travel to, or remain in, these countries for work or study, with the approval of the Vice-Chancellor on the advice of the Director, HR, where appropriate risk management strategies are in place.

**Note:** Travel delegates are retrieved from the HR database. If the information in the dropdown is blank or incorrect, contact HR to update employee record with the correct information.
Submitting the form

A Travel Approval request can only be submitted if all compulsory fields have been completed.

**STEP 64** Check the navigation panel for any validation errors, which will show as pink.

- If there are validation errors, click on the section name to review and resolve. More information can be found in the Validation Errors section of this document.

**STEP 55** Once all sections of the form have been completed and validated, click on the Submit button which will send a notification to the selected Supervisor for approval.

- After a form has been submitted, it is immediately assigned to the selected Supervisor. Only forms currently assigned to the user can be edited. To make changes after a form has been submitted, contact the supervisor who can send it back to the traveller. See Forms Assigned to Me in Section 2 of this user guide.

What happens next?

Once a form has been successfully submitted, the following message will appear to notify the next step in the process:

The traveller won’t see the form again, until it has been either approved or returned by the supervisor or a delegate asking for clarification, amendments or if approval is not granted.

Click **Home** to return to the home page or click **Log Out** to exit the Forms system.
Post Travel

Once a form has been approved by the supervisor and relevant delegates, the traveller will be notified via email that the Travel has been approved, and that they are required to complete the post travel forms.

- Login in to the eForms system and click on the Travel Approval form link circled above to complete the post travel forms.

**STEP**

Select from the following two options:

- **I have returned from travel and wish to complete the post travel forms:** Once travel has occurred, the traveller must complete the post travel forms within 15 days of returning.

  - Read and check the declaration box to confirm that you understand the travel form can’t be reinstated once cancelled.
  - Enter the reason the travel didn’t go ahead.
  - Click *Submit* to cancel the travel approval. This completes the process.

- **I would like to cancel my approved travel request:** If the travel isn’t proceeding.

  - Enter the reason the travel didn’t go ahead.
  - Click *Submit* to cancel the travel approval. This completes the process.
The next few pages are for review purposes only so cannot be edited.

- Check the details of the Travel Approval form that was submitted. Any changes must be made to the Travel Diary.
If there were variations to the originally approval travel form, the traveller can advise of the changes in the Travel Diary.

**STEP 58** Check the Planned Date information and if different from completed travel, enter the revised dates in the Actual Date From / To fields.

**STEP 59** Any changes made to actual dates of travel, must be reflected in the Travel Segments, including any variations to location or travel type (e.g. Business, Personal).

- If an additional travel segment is required, click on the icon and enter the detail as previously done for the original travel approval.

**STEP 60** Read the acknowledgement and click on the checkbox to agree.

**STEP 61** Where there is a personal component of travel, enter the details for FBT on the Post Travel FBT Calculation page as follows:

- **Actual cost of Airfares**: FBT is charged on the private component of airfares where greater than 40%
- **Other Costs Directly Associated**: Includes private accommodation, other private travel and weekends
- **Business Costs Funded by the Employee**

(refer to the ANU Travel Procedure for further details)
STEP 62 Click on the Submit button to complete the Post Travel forms.
Validation Errors

Each time a user navigates off a page, the system will check the information entered (validation). If navigating using the button, the form won’t have progressed to the next page and a description of the error will be shown in a red box.

To move forward without fixing the error at this point in time, use the left navigation menu. Any outstanding errors on a page will be highlighted in pink in the navigation menu.

A user is able to move through the form with validation errors by clicking on a section in the navigation menu, however, won’t be able to submit the form until all errors are resolved.

If you click Submit while there are outstanding issues, you will receive a message in red text as shown below stating a page requires your attention.

**Note:** Validation warning boxes will not disappear until you leave the page.
SECTION 3 - APPROVAL PROCESS FOR DELEGATES

Supervisor Approval

Once a Travel Approval form has been submitted, the approving supervisor will receive an email advising of the request for travel. Click on the link in the email to sign in to the ANU online forms system.

Any forms awaiting supervisor approval are shown in the Forms Assigned to me section as shown below:

- Click on the Travel Approval form link circled above to review the travel request.
- The supervisor is responsible for checking each page of the form to ensure accuracy, and can edit any of the details submitted by the traveller.
- On the Supervisor Endorsement page, there are a number of options to select from:
  - I endorse the travel request: if all details on the form are correct and the form can be progressed to the next approval delegate.
  - I would like to return to the travel request for amendments: to send the approval form back to the traveller for changes. Provide an explanation for the traveller in the comments box.
  - I reject the travel request: where travel is not approved. Provide an explanation for the traveller in the comments box.

- Click Submit button
Domestic Travel Delegate Approval

Once a Travel Approval form has been approved by the supervisor, if there is a domestic segment, an email is sent to the selected domestic delegate advising of the request for travel being assigned to them for approval. Click on the link in the email to sign in to the ANU online forms system.

Any forms awaiting domestic delegate approval are shown in the Forms Assigned to me section as shown below:

- Click on the [Travel Approval](#) form link circled above to review the travel request.
- Check relevant information on the form. Any delegate can edit details on the form submitted by the traveller.
- On the Domestic Travel Request Approval page, there are a number of options to select from:
  - **I approve the travel request**: if all details on the form are correct and the form can be progressed to the next approval delegate.
  - **I would like to return to the travel request to the Traveller/Supervisor for amendments**: to send the approval form back to the traveller or the supervisor for changes or clarification. Provide an explanation in the comments box.
  - **I reject the travel request**: where travel is not approved. Provide an explanation in the comments box.

- Click **Submit** button
International Travel Delegate Approval

Once a Travel Approval form has been approved by the supervisor and domestic travel delegate (where applicable), if there is an international segment, an email is sent to the selected international delegate advising of the request for travel being assigned to them for approval. Click on the link in the email to sign in to the ANU online forms system.

Any forms awaiting international delegate approval are shown in the Forms Assigned to me section as shown below:

- Click on the Travel Approval form link circled above to review the travel request.
- Check relevant information on the form. Any delegate can edit details on the form submitted by the traveller.
- On the international Travel Request Approval page, there are a number of options to select from:
  - I approve the travel request: if all details on the form are correct and the form can be progressed to the next stage.
  - I would like to return to the travel request to the Traveller/Supervisor for amendments: to send the approval form back to the traveller or the supervisor for changes or clarification. Provide an explanation in the comments box.
  - I reject the travel request: where travel is not approved. Provide an explanation in the comments box.

- Click Submit button
High Risk Travel Approval

Once a Travel Approval form has been approved by the supervisor and domestic and/or international travel delegate(s) (where applicable), where travel is to a high risk destination, an email is sent to the selected high risk travel delegate advising of the request for travel being assigned to them for approval. Click on the link in the email to sign in to the ANU online forms system.

Any forms awaiting high risk travel approval are shown in the Forms Assigned to me section as shown below:

- Click on the Travel Approval form link circled above to review the travel request and modify where required.
- On the High Risk Travel Approval page, there are two options to select from:
  - I approve the travel request: if all details on the form are correct and the form can be finalised and returned to the traveller for Post Travel form completion.
  - I reject the travel request: where travel is not approved. Provide an explanation in the comments box.
- Select the relevant Dean from the dropdown list to notify of the request for high risk travel.

- Click Submit button
### SECTION 4 - GLOSSARY OF TERMS

<table>
<thead>
<tr>
<th>Report Terms</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic / International Delegate</td>
<td>Person within a Division/Department who has been assigned authority to approve domestic or international travel. This delegation is recorded in the HR database.</td>
</tr>
<tr>
<td>Fieldwork</td>
<td>Work undertaken for or in support of research, teaching, or instruction at an off-campus location as part of the activities of a Budget Unit. It may involve remote locations.</td>
</tr>
<tr>
<td>FBT</td>
<td>Fringe Benefits Tax (FBT) is payable by the traveller if the private component of a work-related trip exceeds 40% of the total trip.</td>
</tr>
<tr>
<td>Hazard</td>
<td>A situation or thing that has potential to harm a person.</td>
</tr>
<tr>
<td>Per Diem</td>
<td>Amount set by the ATO for meals and incidentals in lieu of actuals.</td>
</tr>
<tr>
<td>Remote</td>
<td>A location separated from an appropriately resourced urban centre by distance, terrain, access, time and/or available communication links. A remote area may be on land or water. A remote area is not necessarily related to the distance from an urban centre. In the event of an emergency, assistance would be delayed, with the possibility of adverse outcomes.</td>
</tr>
<tr>
<td>Risk</td>
<td>The possibility that harm (death, injury or illness) might occur when exposed to a hazard. Risk is measured in terms of:</td>
</tr>
<tr>
<td>Risk control</td>
<td>Taking action to eliminate health and safety risks so far as is reasonably practicable, and if that is not possible, minimising the risks so far as is reasonably practicable. Eliminating a hazard will also eliminate any risks associated with that hazard.</td>
</tr>
<tr>
<td>Travel Segment</td>
<td>A general overview of each fragment of the intended travel, including travel dates, destination, transit period (where flying time is over 12 hours) and whether there will be any private travel included with the business trip.</td>
</tr>
<tr>
<td>Volunteer</td>
<td>Generally an unpaid member of the field party. A volunteer is still under the general control of the Fieldwork Supervisor and should comply with this procedure. An agreement should exist between the University and a volunteer.</td>
</tr>
</tbody>
</table>
SECTION 5 - GETTING ASSISTANCE

Where do we go for assistance?
The Travel Approval Support Team are located with Finance & Business Services and provide assistance on how to complete a travel form and be the first point of call for any issues/errors that may occur.

Contact Details
- Travel Approval help desk access number 54321, then select 1 Central then select 6 Travel Approval
- Email address for any enquiries Travel.approval@anu.edu.au

Type of Travel Approval enquires handled
- Assistance on how to complete a form
- Error and troubleshooting
- Workflow administration

Note: The team does not provide support for organising travel, flight, conference, accommodation bookings – this is the responsibility of the traveller

Travel Approval feedback
Request for changes to the travel form and related workflow can be sent to Travel.approval@anu.edu.au.
Requests will be evaluated in context of University requirements by a panel.

Travel Approval Reports
Support provided by Planning Performance and Measurement (PPM) Division Helpdesk insight@anu.edu.au
Access to the ANU Insight System will be required and access can be requested via email insight@anu.edu.au