Travel Approval

Commencing 17 November 14 all new travel approval applications for staff and students will be made through the Travel Approval process.

Travel applications already in progress will continue to completion through existing process.

The Travel Approval process automates, streamlines and simplifies 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.

The Travel Approval process is a business process which guides the traveller, based on policy based procedural rules, in completing the Travel Approval eForms and routes these applications to supervisors and delegates for approval. Travel Approval information is also pushed to Finance and HR systems.

The Travel Approval process enables a traveller to create and track the progress of a submitted travel approval, and access previously completed forms which can be used as the basis for new requests.

Please note the Travel Approval process requires a broad overview of intended travel for approval purposes only and is not a travel itinerary. A travel itinerary is obtained once travel approval is granted and all travel bookings are confirmed and paid. This is usually provided by your travel agent or administrator.

Access

The Travel Approval process is completed by the traveller by accessing the Travel Approval eForm portal using their University ID and password.

The eForm portal can be accessed at the following locations;

ANU Travel Approval website page  https://eforms.anu.edu.au/Infiniti_Prod/Produce/
ANU website Staff page
Accessing Off Campus

The Travel Approval process uses a web based system and can be accessed anywhere an internet connection can be established. It is ready for use on most mobile devices (phones, tablets, iPads etc.).

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 ANU Staff page. Should there be any connection problems it might be necessary to first connect to the ANU Virtual Private Network (VPN) before accessing the eForms. For assistance on setting up the VPN go to [http://itservices.anu.edu.au/it-security/vpn/](http://itservices.anu.edu.au/it-security/vpn/).

Travel Approval Process Overview

The Travel Approval Process;

1) Consolidates various existing forms, including; travel application, risk assessment, fieldwork, budget, insurance, delegation approval, reimbursement request, etc.
2) Automatically authenticates the identity of the traveller applying for travel (via Uni ID and password)
3) Has a range of in built validation checks to ensure all required areas of the Travel Approval are complete
4) Allows the attachment of supporting documents
5) Automatically checks the DFAT website for countries at risk
6) Automatically updates the University’s HR and Finance enterprise systems with travel details
## Steps in the Travel Approval Process

<table>
<thead>
<tr>
<th>Step 1 Preparation</th>
<th>All travellers know the purpose and destination of their travel and some preparation is required in completing the Travel Approval. This includes knowing the expected dates of travel, travel cost quotes or estimates and if possible the account to which the cost of travel will be attributed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2 Complete and Submit the Travel Approval eForm</td>
<td>Traveller completes the Travel Approval eForms and submits. The Travel Approval can be saved and retrieved anytime during the process. If necessary the traveller can cancel the request once submitted.</td>
</tr>
<tr>
<td>Step 3 Supervisor and Delegate Approval</td>
<td>The completed Travel Approval is sent to the relevant supervisor for approval. Further routes the travel approval to other University staff for special approvals for overseas travel, such as high risk travel. The supervisor or delegate can request further information from the traveller prior to approval.</td>
</tr>
<tr>
<td>Step 4 Traveller Notification</td>
<td>Automatically advises the traveller of approval by email with an attached PDF Travel Approval Summary. The Travel Summary is a concise record of the Travel Approval information.</td>
</tr>
<tr>
<td>Step 5 Post Travel Diary</td>
<td>Once the traveller returns they are required to complete the post travel diary to update any change in travel and/or travel costs.</td>
</tr>
</tbody>
</table>

**Travel Approval Process Flow**
Support and Instructional Tools

While the Travel Approval Process is intuitive and easy to use, a series of support structures are already in place and being established to support travellers, staff and delegates. These are:

- **Quick Reference Guide** for Travel Approval eForm overview
- **User Reference Guide** for detailed step by step instruction in completing each page of the Travel Approval eForm
- **FAQs (Frequently Asked Questions)**
- **Video Guides** (in development)
- **Travel Approval Reports** (in development)

**Travel Policy**

Travel Policy and Procedures include a number of forms that have been included in the online Travel Approval Process.

Some of these forms may be required to complete in progress travel approvals. Links have been placed against each form advising travellers that;

"The below form is only to be used in relation to travel approved before Monday 17 November 2014, for all other travel please use the online Travel Approval Process above."

A full review of the Travel Policy and associated procedures commences Tuesday 18 November 14.

**Travel Approval Reports**

Travel Approval Reports increase the ability to manage Travel Approvals. A series of reports are being produced with information such as; date and country location of travellers, changes to DFAT risk rating of countries, summary of information provided in submitted Travel Approvals etc.

If you would like access these reports please send an email to insight@anu.edu.au

**Familiarisation Coaching Sessions**

A series of familiarisation and coaching sessions are available to travellers and staff providing instruction, guidance or simply answering questions re the use the Travel Approval online process.

The session is conducted in a computer lab and is hands on. If you would like to become familiar with the Travel Approval eForms or complete your Travel Approval form for an upcoming trip please register through HORUS. How long you stay is your choice. Members of the Travel Approval Support Team and Travel Approval Champions will be there to assist you.

If you have just one or a two questions, or need to be taken through one particular step of the Travel Approval, you are very welcome to simply drop in without have registering. The HORUS Couse and session codes are below
Travel Approval Familiarisation and Coaching sessions

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Session Number</th>
<th>Date</th>
<th>Day</th>
<th>Time</th>
<th>Venue</th>
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<tr>
<td>TA01</td>
<td>01</td>
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<td>Hancock (Bldg 32) Room G1</td>
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Getting Help and Assistance

Help Desk

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

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

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

Feedback and Improvement suggestions

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

PPM Help Desk

Planning Performance and Measurement (PPM) Division Helpdesk provide support with any questions regarding the reports and can be contacted insight@anu.edu.au

Travel Approval Champions

Travel Approval Champions provide support for travellers and staff in the use of the new Travel Approval Process. They will facilitate and guide travellers on where to access assistance and if possible guide travellers in the completion of the travel approval
FAQs (Frequently Asked Questions)

1. As an administrator why can’t I see the forms to continue to check that the information is correct?

Any process improvement requires that we do not replicate current shortfalls in the process, rather focus on what we need to achieve. Streamlining the travel approval process and forms requires that we try and ensure the information is being entered correctly from the start; trying to do it right the first time. It is a change in how we approach the travel approval. As there is no checking function, the energy used to check should be re-focussed to assisting the traveller and encouraging them to ensure the accuracy of the information they provide.

Reporting will provide some visibility to administrators with a summary of the Travel Approval information. You can request access to these reports via a link in the Travel approval webpage.

2. Can I access the eForms system outside of ANU?

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 traveller 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/. To access the eForms system off-campus, you will need to set up the ANU Virtual Private Network (VPN) before opening the eForms system. Instructions for setting up the VPN outside of ANU: http://itservices.anu.edu.au/it-security/vpn/. Once the VPN is connected, you can access the eForms via the link on the ANU staff page.

3. What paper forms has the Travel Approval Process replaced?

A series of 10 manual forms have been converted to a streamlined travel approval process. Consequently all of the previously completed paper forms are no longer required if you are an exchange student or travel is being undertaken for a visitor.

The replaced forms include: travel application, fieldwork, risk assessment, budget, FBT, per diem, cash advance, insurance, delegation approval, post travel diary.

What types of travel can I select?

4. What are the different types of Travel in the Travel Approval?

Any travel you undertake falls into one of four categories, to be able to determine if any FBT payment is required by the traveller?

**Business**

An activity undertaken by an employee (i.e. attendance at a meeting, a conference, field research, speaking at a lecture) having a duration of more than 3 hours, that relates to their work as an ANU employee.

**Transit**

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.

**Private**

The number of days that are not business days, days in transit or unavoidable delays.
Special Consideration Days
Additional days approved by the travel delegate in circumstances where the traveller requires additional days for recovery due to health and safety.

5. Can I add on some personal travel to my work trip?
Yes. A private travel component can be taken as part of your business trip. An estimate how much you need to contribute is calculated on the Pre Travel FBT Estimation page of the Travel Approval form. If the personal component is 40% or greater, you will be required to contribute to the cost. The Fringe Benefit Tax (FBT) Act states that where ANU pays for or reimburses extended travel for an employee, FBT will be payable where the private component of the trip is considered to be more than merely incidental to the business activities.

6. I have an interstate conference that commences early Monday morning, so want to travel up on Sunday to arrive in time. Is Sunday counted as a business day or a private day?
Sunday is a transit day, and is therefore excluded from the calculations when assessing the predominant purpose for the trip for FBT calculations.

7. Do I need to include a “transit” travel segment?
Not always. If there is a flying time greater than 12 hours, then a transit segment must be added. If travelling shorter distances internationally (e.g. New Zealand), you may only need to add a single international segment and which will be considered business. However, if you wish to claim per diem for both the domestic and international portions of your trip, you will need to include both a domestic and international travel segment in the Travel Approval.

8. How is per diem calculated?
A traveller may receive a modest per diem payment to cover meals and incidentals, in lieu of actuals. The amount of the per diem must be approved in advance and must be no more than the amount determined as a ‘reasonable daily food and drink and incidentals allowance’ by the Australian Taxation Office. A lesser amount may be deemed appropriate by Colleges/Service Divisions with a ceiling of the amount that is claimable. Per Diem payments are only available for work-related travel.

9. If my meal is covered in a conference, how can I remove this from the calculated per diem amount?
A breakdown of the ATO per diem rates by meal type can be found on the ATO website. Once the per diem is calculated, the meal covered in the event can be removed from the total amount when inserted on the Travel Budget page.

10. Do I still need to complete a cash advance and per diem form?
No. Once travel has been approved by supervisor and delegate(s), cash advance and per diem amounts from the completed form are automatically sent to finance for processing and payment.

11. Why can’t I overlap days on the Travel Plan so I can add my full travel itinerary?
The Travel Plan page is to record an overview of your intended travel plans for the purpose of obtaining approval to travel and calculating FBT as required by the Australian Tax Office. The Travel Page is not a travel itinerary. Your travel itinerary, as opposed to the Travel Approval, would include the detail of each leg of your journey, each connecting flight or other mode of travel.
The type of travel is determined by how you spend the majority of your time. If you wish to include a full itinerary, it can be attached or entered on the Supporting Documentation page.

12. Why can’t I enter Australia as my destination, when returning from overseas?

The travel segment is destination based, so if returning to Australia from an international trip, you would add it as a domestic segment as the destination is a domestic location.

13. What if I want to amend my travel after it has been submitted?

Only forms currently assigned to you can be edited. Once a form has been submitted, it is no longer assigned to you. You can check who the form is currently assigned to by clicking on the Form Activity link in the header. If you need to make changes to the form, contact your supervisor/delegate and ask them to send it back to you, which they can do by opening the form and selecting “I would like to return to the travel request for amendments” from their approval page. You can then make the required changes and resubmit the form.

If a traveller has submitted a travel request and the supervisor/delegate is away, the traveller can contact the travel support helpdesk (see Section 6 of this guide). The helpdesk can send the form back to you so it can be resubmitted with the appropriate supervisor/delegate.

14. How do I update my supervisor and travel delegates which are incorrect?

This information is retrieved in real time from the HR database. Any wrong information showing on the travel form must be updated by HR. Contact your local HR representative to advise the required changes.

15. Can an EA or the school’s travel admin team have access to the forms to complete on someone’s behalf?

Travel Approval form must be completed by the traveller, as the legal declarations/acknowledgements on the form are a virtual signature for the traveller. To create Travel Approval requests requires the traveller to access the Travel Approval eForms and enter their UID and university (normal) password. Providing you university logon and password to another person goes against university policy.

Once travel is approved by the delegate the traveller receives a notification via email. This email contains a Travel Summary PDF which contains all of the travel approval information completed. The email containing the Travel Summary can be issued to the appropriate person assisting with travel bookings.

16. If I have already entered my travel start date why do I have to enter it again on the Travel Plan page?

This option is being considered, however, it is important for the traveller to make a conscious choice of the dates in the travel segment.

17. If the fieldwork is on a ship in international waters and not docked in a country what option do I select on the Travel Plan?

If a vessel is in international waters, select International and Other as the country and include any details you may have (e.g. 600km west of Perth in international waters).

18. How can I find out who is travelling in a particular area that may be experiencing a natural disaster?

The Planning and Performance Measurement team are creating a suite of reports for administrators to be able to immediately access information as to the location of any ANU
traveller at any point in time. The Travel Approval Reports will also update the DFAT risk level rating of all countries dynamically to be able to monitor persons in high risk destinations.

This is an evolving list.....