



Government of **Western Australia**  
Department of **Health**

## ATTACHMENT 1

# WA Health

# Staff Air Travel Guidelines

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**Title: WA Health Staff Air Travel Guidelines**

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## 1. Responsibility of the travelling employees

The employee travelling must familiarise him/herself with the WA Health Staff Air Travel Policy, these Guidelines and local management procedures and practices relating to travel prior to applying for and undertaking any travel. This includes the procedure for payment of travel and travel related expenses and record management.

Prior to travel, an employee must complete a WA Health Staff Air Travel Proposal form (Attachment 3), attach the relevant supporting documents (Checklist for travellers, Attachment 12) and have it approved by the relevant delegated authorities within the required timeframes (Attachment 2).

### 1.1 Who is required to submit a Travel Proposal form

A Travel Proposal form is required if one or **more of the following applies**:

- a) **Partial or all of your travel costs are being funded by a commercial or non-commercial sponsor**
- b) **You are travelling on official business (including travel to conferences, seminars, meetings or study programs) irrespective of funding type. (excluding self-funded travel for doctors utilising professional development leave - See section 5.6)**
- c) **Partial or all of your travel costs are being funded operationally by WA Health.**

The following are a few examples of when a Travel Proposal form is required:

- If you are travelling in your own time (for example on annual leave, weekends or rostered off) but your flights and conference fees are being funded by a sponsoring body.
- If you are travelling on official business travelling during regular working hours and you are not taking any form of leave but you are representing WA Health at the event.
- If you are travelling on official business by utilising leave entitlements including study, conference and community service leave during the travel period.

### 1.2 Completing a WA Health Staff Air Travel Proposal form

The Travel Proposal form (Attachment 3) requires employees to explain the purpose and tangible benefits to WA Health from their proposed travel. The form also requires a best possible estimation of costs associated with travel as at the date the form is completed. It is recognised that the estimation may vary to actual cost.

All attachments, or additional information to support an employee's request, must be submitted as part of their original request, and may include:

- conference (or other event) brochures, registration forms and/or invitation
- reference to any special conditions applying to travel arrangements (where more favourable conditions apply under individual employment contracts or industrial award/agreement e.g. business class travel)
- travel quotations for overseas travel where applicable

- subsidiary authorisations and financial assistance from relevant funding sources (for example travel committees or specific and special purpose account fund holders)
- declarations of no conflict of interest from employee and/or sponsoring organisation
- copy of the leave form for the period identifying the type of leave being sought, such as professional development/study leave, special leave or annual leave.

Any leave that is to be taken immediately before, during or after any official travel by employees must be declared and included in the travel proposal and in the case of overseas travel in the summary report to Parliament. **If the leave exceeds 4 working days in total, then only a one way air fare is to be funded by the DoH or HS.** In this case the travel costs funded by the employee are to be arranged by the traveller and made separately to the travel arrangements being made by the DoH or HS.

**[Where leave in excess of 4 working days is to be taken before, during or after any official travel the DoH or HS will not fund or purchase the full return air fare cost even when the traveling employee is prepared to reimburse half of the travel cost.]**

Official travel includes travel that is funded from a Special Purpose Account. Leave that is intended to be taken before, during or after travel that is funded by a Special Purpose Account needs to be disclose and be part of the travel proposal. If this leave exceeds 4 working days in total then only a one way fare is to be funded by the DoH or HS. For the purpose of this policy leave includes annual leave, conference leave and professional leave.

Leave that is to be taken immediately before, during or after any travel that is: private, self-funded or is sponsored – commercial or non-commercial is not covered by this leave requirement although employees and delegates dealing with a leave proposal should be aware of the principle of leave taken in association with travel as provided for in the Premier’s Circular 2014/02.

For a checklist to ensure all relevant documents are attached prior to submitting a form for approval see Attachment 12.

### **1.3 Addressing the Travel Approval Criteria**

Requests for interstate and overseas travel for business purposes will only be considered by the Minister or appropriate delegate on the basis that:

- the travel will cause minimal disruption to the delivery of health services, and in particular, patient services, to the people of WA
- any travel for the purposes of professional development will have a demonstrable benefit to health care in WA
- attendance at interstate and overseas conferences/courses is essential to the efficient performance of an employee’s functions and required to meet WA Health outcomes
- teleconferencing and other advanced communication facilities have been considered as an alternative to air travel and have not been deemed feasible
- the total cost, including relief staff if applicable, must be reasonable and justified

- justification for other employees travelling at the same time to perform the same/similar duties or attend the same event. The number of employees travelling on any one trip should be kept to a minimum.

#### **1.4 After travel**

Employees who attend conferences or courses are to provide some form of information of what they learnt at the conference or course to their peers and the Health entity. This could be in the form of:

- an email to staff outlining key lessons
- dissemination of a paper or research
- a presentation to staff.

It is the responsibility of local Health entities to coordinate the submission of such reports, and dissemination to relevant parties. A copy or formal acknowledgement by the Manager that this has occurred must be kept with the approved Travel Proposal form for auditing purposes. It is expected that this be completed within one month after returning to work after the conference.

## **2. Approvals**

All employee travel requests, regardless of the source of funding, must be approved at the discretion of the Minister or the Minister's delegate in accordance with the Travel Approval Delegation Matrix (Attachment 2).

Requests seeking approval to travel are to be submitted prior to undertaking travel within required timeframes to allow sufficient time for requests to be appropriately considered and approved. This will also enable sufficient time to arrange registrations and bookings to take account of any discounts etc.

## **3. Travel Coordinators**

Travel Coordinators (or designated employees) are responsible for assisting Health entities in managing the processing of travel proposals and associated expense claims effectively to promote the efficient use of public monies.

Travel Coordinators are responsible for:

- facilitating authorisation of all applications for travel in a timely and efficient manner
- advising applicants of the outcome of their travel request/s
- arranging all travel bookings in line with business requirements
- giving preference to booking all domestic and overseas travel online to minimise booking fee charges
- ensuring intrastate and interstate travel bookings are undertaken against the CUA mandatory contract and on the 'Best Fare of the Day' principle
- ensuring all coding is carried out in the flexi purchase
- preparing the Quarterly Report and other reports as required

- coordinating and checking all travel payments and claims to ensure that these are in line with the level of funding approved on the travel proposal forms
- ensuring approved Travel Proposal forms are submitted to Health Corporate Network, along with related expense claim forms, for processing.

#### 4. Travel bookings

Travel bookings and payments associated with travel **must not** be made until after the travel has been approved by the required authority or delegate (see Approval Delegation Matrix, (Attachment 2)).

It is preferred where possible for all travel bookings to be made by or in conjunction with Travel Coordinators (or designated employees) within Health entities. Travel related expenses (for example registrations, accommodation, car hire) are to be paid by the Travel Coordinator (or designated employees) using purchasing cards.

This approach enables the Health entity to: reduce processing costs; avail input tax credits on Goods and Services Tax payable where applicable; and effectively manage the process and use of travel bookings (for example travel credits may be transferred from one employee to another to make use of cancelled flight credits).

If associated travel expenses are paid by the Health entity they must not be claimed by individuals as a travel allowance or reimbursement. Note: No airfares can be paid for using purchasing cards.

Travel approvals must comply with the delegation matrix – Attachment 2:

- **Intrastate travel:** must be approved by an approved delegate per the Department of Health delegation matrix or Executive Director (for Area Health Services).
- **Interstate travel:** must be approved by the Director General (for the Department of Health) or Chief Executive (for Area Health Services).
- **Overseas Travel:**
  - For medical officers (doctors) externally funded (including Special Purpose Accounts (SPA), sponsorship or by the individual) travel must be approved by the Director General (for Department of Health) or the Chief Executive (for Area Health Services).
  - For all other staff travel externally funded (including Special Purpose Accounts (SPA), sponsorship or by the individual) travel must be approved by the Minister for Health.
  - For all staff travel (including medical officers) funded partially or completely by operational monies, travel must be approved by the Minister for Health.

The timeframes, outlined in Attachment 2, recommend for a Travel Proposal to be submitted for approval is as follows:

| <b>Destination</b> | <b>New Recommended timeframe</b>             |
|--------------------|----------------------------------------------|
| <b>Intrastate</b>  | 4 weeks prior to the proposed date of travel |
| <b>Interstate</b>  | 6 weeks prior to the proposed date of travel |
| <b>Overseas</b>    | 6 weeks prior to the proposed date of travel |

Note: The travelling officer must ensure that all supporting documents required as per this Policy are attached to ensure the shortest processing time (see Attachment 12 for a Checklist)

#### **4.1 Domestic travel bookings**

It is mandatory for Government Agencies to make their domestic air travel bookings through State Government CUA. Travel arrangements are to be made in accordance with buyers' guides associated with these agreements.

For the current CUA see:

<https://www.contracts.wa.finance.wa.gov.au/family.jsp?item=97&STMP=150730152754224>

The use of CUA provides benefits to WA Health through special-to-government discounted airfares and reduced booking fees (particularly for on-line bookings).

In regional areas agencies have the discretion to apply the 'Buy Local Policy' to procure travel management services (*Premier's Circular 2009/04*).

#### **4.2 Overseas travel bookings**

Overseas travel bookings can be made through the CUA agent used for domestic travel but it is not mandatory.

#### **4.3 'Best Fare of the Day'**

All travel bookings made by WA Health must take advantage of the most economical travel arrangements possible and apply the principle of 'Best Fare of the Day'. This applies to all domestic and overseas travel bookings irrespective of the source of funding including Special Purpose Accounts (SPA).

When determining the 'Best Fare of the Day' consideration is to be given to:

- the lowest fare that exists in the marketplace at the time of the booking and for which a seat is available
- the business requirements of the traveller
- other relevant costs such as accommodation, taxi fares and waiting time

Note: This does not mean that travel must automatically be an overnight flight or 'red-eye' special. Travellers are not expected to travel in circumstances where there are unacceptable safety or security concerns.

Where employees choose not to access the 'Best Fare of the Day', they must provide reasonable justification to the delegate as to why they have deviated from the policy. This decision along with the justification is to form part of the travel request.

The purchase of full economy (Y class) fares should only be made when:

- no discounted air tickets are available under the 'Best Fare of the Day' principle (which includes a consideration of business requirements such as availability of discounts at the appropriate time of day)
- the traveller is unlikely to travel again on Government business within the ensuing 12 month period and there is some likelihood that their trip may be cancelled and no refundable or transferable discounted air tickets exist.

#### **4.4 Selection of an airline**

Selection of an airline for official travel bookings is not to be made on the basis of traveller preference, frequent flyer points or other incentive or loyalty schemes. The selection of the airline is determined by the 'Best Fare of the Day'.

#### **4.5 Upgrading class of travel**

Employees may upgrade to business class at their own expense but only where the bookings:

- Are made through a Travel Coordinator with a CUA provider
- The selection of the airline utilises the 'Best Fare of the Day' principle; and
- The employee pays the Health Entity the difference between the 'Best Fare of the Day' and the applicable upgrade fare, **in full prior to the travel having commenced.**

Note: the upgrade fare cannot be paid using Frequent Flyer points or other reward incentive schemes.

A copy of the 'Best Fare of the Day' must be retained on file for audit purposes. If an employee travels without the difference in the fare they will also be responsible for all costs incurred by the Health Entity including debt collection and legal fees in recovering the debt, should this be required.



## **5. Claims and Expenses, Professional Development Leave and University Academics**

Managers and Travel Coordinators are responsible for managing the process of travel expense claims effectively to promote the efficient use of public monies.

Responsibilities of the travelling employee are:

- to maintain documentary evidence (for example receipts, tax invoices and travel diaries) for taxation purposes
- to submit a correctly authorised Travel Proposal form together with relevant documentary evidence, when submitting a travel claim
- to notify the Travel Coordinator of any changes to travel arrangements (for example cancellation of travel plans) and where applicable repay any monies previously paid to the employee
- where travel involves an overnight stay, to ensure that accommodation documentation is retained as evidence for twelve months for audit purposes. Where hotel/motel rates are claimed the employee must state the name of the hotel/motel and provide receipts when requested by the Health entity
- to document trip departure and return times - when calculating the rate of reimbursement for part of a day it is important to note arrival and departure times.

WA Health's preferred approach is for all travel related expenses (for example registrations, accommodation and car hire) to be made by the Travel Coordinator (or designated employee) using purchasing cards.

If travel expenses are paid using the purchasing card they must not also be claimed by individuals as an allowance or reimbursement.

### **5.1 Alternative to purchasing cards**

In circumstances where it is not possible or not feasible to pay for travel related expenses with a purchasing card a tax invoice/receipt must be sought and then a payment/reimbursement can be organised.

The total amount reimbursed is not to exceed the amount authorised on the Travel Proposal form. Employees cannot claim the difference between the amount actually paid for accommodation and meals and the amount the employee may be entitled to claim as an allowance as per their industrial award/agreement.

### **5.2 Advance Payment of a travel allowance for a short term travel event**

For travel that is short term and unlikely to require significant changes after airfares are booked, such as attendance at conferences, seminars allowances for meals, accommodation and incidental expenditure may be paid in advance in accordance with the relevant industrial agreement. Claims for allowances in advance will be paid no earlier than

four weeks prior to the scheduled date of departure and only after receipt of approval to travel.

To organise an advance payment a Health Corporate Network (HSS) Allowance Claim Form must be completed before a payment can be made to the employee's nominated bank account.

Note: This will not include any cash in advance drawn against a purchasing or credit card. Health entities reserve the right to request proof of the type of accommodation utilised (for example receipt or tax invoices) on the employee's return to work.

Managers/Travel Coordinators are responsible for ensuring all necessary action is taken to recover all funds paid in advance of travel should an employee not travel as and when planned. This will include any fees paid for event registrations.

### **5.3 Extended or frequent travel - Payment of a travel allowance**

For travel that is frequent, extended and is likely to require significant changes after airfares are booked (for example dental services staff in mobile dental clinics or audit staff conducting planned audits) allowances for meals, accommodation and incidental expenditure will be paid at the completion of the travel or at the end of each month. Such payments will be made to the employee's nominated bank account, but will not include any cash in advance drawn against a purchasing or credit card. Only accommodation and meals not paid directly by the entity and/or as part of the registration and incidental expenses, as per the relevant industrial award/agreement, can be paid.

To organise a claim a HSS Allowance Claim Form must be submitted to the Travel Coordinator. Allowances, including any incidental allowances, are to be calculated in accordance with the relevant Industrial Award/Agreement provision. It is to be based on the departure and arrival times where applicable, and adjusted for any accommodation or meals, either paid directly by the Health entity and/or paid as part of any event registration process. Health entities reserve the right to request proof of the type of accommodation utilised (e.g. receipt or tax invoices) on the employee's return to work.

Note: Meals paid for by the Health entity cannot be claimed again, even if an alternative meal has been purchased.

### **5.4 Reimbursement of actual costs**

In some cases, an employee may pay their own registration, accommodation and meals and be reimbursed the actual costs incurred. Prior to doing so, the Travel Proposal form must be approved and in accordance with the relevant industrial award/agreement provisions.

On completion of travel a HSS Allowance Claim Form must be completed within one month following the travel. Any Goods and Services Tax paid by the employee will be reimbursed provided the documentation complies with relevant taxation legislation. Note: Meals paid for

as part of accommodation package and/or event registration cannot be claimed as a reimbursement, even if the employee has purchased an alternative meal.

### **5.5 Partially funded/Joint funded Travel**

When travel is only partially funded by WA Health, or where joint funding is provided either by the employee or another body, then the amount approved on the Travel Proposal form will be the only amount paid to the employee.

### **5.6 Travel undertaken in association with professional development leave**

Under the provisions of some industrial agreements salaried medical officers may be paid an allowance which is intended to offset part of the cost of subsequent travel and other associated expenses incurred when accrued professional development leave entitlements are utilised. This allowance is paid on a regular and continuing basis is taxed as personal income and is considered 'self-funds' for the purposes of this Policy.

Travel and all associated expenses which is exclusively self-funded does not require approval for the purposes of this Policy unless such self-funded travel is contiguous with or proximate to travel which otherwise requires approval under the Policy.

Please see below examples of when a Travel Proposal form is and is not required for professional development leave:

#### A Travel Proposal form is required when:

The medical officer is utilising professional development leave during their travel period but some or all of the costs of the travel (including airfare, accommodation, registration fees and associated costs) are being met by a sponsor, operational funds or Special Purpose Accounts (SPA).

The medical officer is travelling on WA Health time (no leave being taken) and also using professional development leave during the same travel period.

#### A Travel Proposal form is NOT required when:

The medical officer is using professional development leave or special leave allowances (and/or in combination with annual leave) is self-funding travel (including airfare, accommodation, registration fees and associated costs).

Note: Medical officers must clearly indicate their destination on their leave form. The leave form must be submitted and approved by their Manager before travel commences.

If a Travel Proposal form is required then full disclosure of all travel arrangements for the duration of the travel must be made, including details of the funding and types of leave as per the Policy. Refer to the Checklist for Travellers (Attachment 12) for the relevant documents required per funding type.

Note: If the individual wants to access WA Health's travel insurance they must complete a WA Health Travel Proposal form.

### **5.7 University Academics (including clinical academics)**

There are many academics including clinical academics that are employed or provide services to WA Health. The nature of the individual's specific employment arrangement can vary.

In general, academics employed by WA Health are subject to the same rules and have the same obligations as all other directly employed staff under this Policy. A concurrent employment contract with a university affords the individual no special protection or relief.

Please see below examples of when a Travel Proposal form is and is not required for academics:

#### When a Travel Proposal form is required:

If the individual is employed by WA Health directly but under the provision of their contract involves time at a university. This money is recouped by WA Health and all leave and travel is managed by WA Health.

If the individual is travelling to attend an event and the duration of their travel falls on both days employed directly by WA Health and days employed directly by their university.

If travel and associated costs are being funded partially or completely by either operational funds or a Special Purpose Account (SPA).

If they are travelling to attend an event, they are being funded by a non-commercial or commercial sponsor and the duration of their travel falls on both days employed by WA Health (including when leave is taken such as annual leave) and days employed by their university.

#### When a Travel Proposal form is NOT required:

If the individual is employed directly by the university but seconded to WA Health for part of their contract to provide services. This cost is then recouped by the university from WA Health and all leave and travel is managed by their university.

If a Travel Proposal form is required then full disclosure of all travel arrangements for the duration of the travel must be made, including details of the funding and types of leave as per the Policy. Refer to the Checklist for Travellers (Attachment 12) for the relevant documents required per funding type.

Note: If the individual wants to access WA Health's travel insurance they must complete a WA Health Travel Proposal form.

## **6. Travel Insurance**

A person is covered by insurance if their Travel Proposal form has been approved by the relevant authority (Attachment 2) in advance, in accordance with the WA Health Staff Air Travel Policy.

If the person is covered by insurance they are covered for travelling on official business that involves an overnight stay away from their usual place of residence.

Such cover will also include any leisure activity undertaken by the employee during the approved business travel, provided that the leisure activity is not undertaken during a period **exceeding two days** of annual, long service leave or special leave entitlements (ADO's, TOIL) that may be taken in addition to the travel event which has been approved.

Except as outlined below, the insurance cover shall commence from the time the employee leaves his/her place of residence or place of employment (whichever is the place of departure for the commencement of the travel) and be continuous on a full time 24 hour a day basis until the employee returns to his/her place of residence or place of employment, which ever first occurs at the termination of such business travel, without deviation or interruption.

In the event of any interruption to the travel of more than two days, for any authorised leave entitlement, then the employee will need to obtain their own personal travel insurance cover for the whole of the period taken for the leave entitlement (including the two day period allowed), but only up to the date the employee recommences the authorised business travel.

## **7. Reporting of travel**

### **7.1 Quarterly Travel Return**

DoH and each HS are required to provide a quarterly summary of all overseas travel undertaken by each officer for each quarter of the year (see Attachment 9).

These summaries are collated by DoH and approved by the DG before being submitted to the Minister for Health's office. The return will then be forwarded to the Department of Premier and Cabinet (DPC) before being published. The template is provided by DPC and is subject to change. Where there has been no overseas travel, a nil return will be submitted.

The DoH and HS are to submit the quarterly summary of all overseas travel to the DoH, Corporate Services before the end of the 3rd week of the first month of each quarterly period.

### **7.2 Monthly report of multiple travel to the Director General**

DoH and each HS are required to provide a monthly report (for the template see Attachment 11) to the Director General to provide a summary of all multiple travel approved for the DoH or HS for the month.

## **8. Breaches of Policy**

Any breaches of the WA Health Managing Conflict of Interest Policy (OD 0264/10) and WA Health) and this Policy could constitute a possible act of misconduct. Please refer to the WA Health Misconduct & Discipline Policy (OD 0562/14) which outlines the relevant processes that are to be followed if misconduct is suspected.



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