

## Information for Travelers – Student/Guest Travel

### IMPORTANT Timeframes to Remember:

**DOMESTIC** travel – begin the completion of relevant forms and sourcing of approvals a minimum of **3 weeks prior to travel**

**INTERNATIONAL** travel – begin the completion of relevant forms and sourcing of approvals a minimum of **6 weeks prior to travel**

### **Step One – Plan your Travel**

Prepare an estimated budget. Quotes for airfares, accommodation and car hire must be obtained from Corporate Travel Management (CTM). Contact details for CTM are on page 02. **Please Note:** no bookings are to be made at this time only quotes.

### **Step Two – Complete Travel Request Form**

Download a Travel Request Form from: <https://www.jcu.edu.au/financial-and-business-services-internal/idcplg110.pdf>

Hints for filling out the travel request form:

- Trip Tracker Number – is only required and is **mandatory for research-related (field) trips**
- Comments Section--- note if a cash advance or reimbursement before travel will be required for any of the budget expenses. Cash advances are only available in exceptional circumstances (travelling to areas with no credit card facilities). Please note that cash advances and reimbursements will take at least two weeks to process.
- Travel Request Form --- Part 2 (2nd page) – is completed upon return when reimbursement is required
- Travel Diary (3rd page) – is only completed when business travel includes an element of Private Travel
- Other Attendees – to be completed by the OIC (Officer in Charge) of Field Trips and should include the names of the students and/or guests whose travel dates and modes match those noted at the top of Part 1. If the travel details of any of the Other Attendees differ, or if they will be claiming reimbursements for travel expenses, they will need to complete their own Travel Request Form.

**IMPORTANT** – Sign the form electronically. Forms that are not digitally signed will be returned.

### **Step Three – Collate supporting documentation and submit all paperwork to [dtestravel@jcu.edu.au](mailto:dtestravel@jcu.edu.au)**

Supporting documentation includes that listed in the attached *DTES TRAVEL REQUIREMENTS* document plus:

- Private motor vehicle: If using your own private vehicle as a method of travel, the attached Private Motor Vehicle form needs to be completed.
- If you are a new traveler you will need to create a travel profile (see the notes in this package on how to request a travel profile).
- If you intend to seek a reimbursement and have not previously received payments from the university, complete the attached *Domestic Creditor Form*.

Submit these forms, along with your Travel Request Form to [dtestravel@jcu.edu.au](mailto:dtestravel@jcu.edu.au)

You will receive an email confirmation of receipt of your form within 48 hours. If you do not receive confirmation within 48 hours, please call Margaret 4781 5039 or Tammy 4781 6385

Once processed, you will receive a Travel Request number.

### **Step Four – Booking Travel**

Confirm your travel bookings through Corporate Travel Management. You **MUST** quote the travel request number allocated by our team in order to finalise your booking. Bookings will not be confirmed without this number. **Please Note:** if accommodation, airfare or car hire bookings are not organised through Corporate Travel Management Company (CTM), the university may not cover the associated costs.

Please note that accommodation is charged on check out and will normally be refunded upon return from travel. **CTM do not pay for accommodation.**

### **Step Five – Prepare for Travel**

If you have requested a cash advance or need to be reimbursed for out of pocket expenses prior to travel, ensure you have followed this up by contacting [dtestravel@jcu.edu.au](mailto:dtestravel@jcu.edu.au) who can confirm payment dates.

### **Step Six – Undertake Travel**

Ensure all receipts for expenses are kept. Receipts must meet the Australian Taxation Office requirements and must not be EFTPOS receipts (receipt that is received when making payment by credit card).

If you are travelling to a remote international destination we recommend taking a receipt book so the details of the purchase can be written down and signed by the supplier.

**Please review the information at: <https://www.jcu.edu.au/global-mobility/how-do-i-apply/travel-insurance-and-jcu-customer-care-medical-assistance-membership> prior to travel**

### **Step Seven – Acquit/Reconcile Travel**

Within 14 days of your return, scan all receipts and complete the reimbursement spreadsheet (this will be sent to you upon your return) and email to [dtestravel@jcu.edu.au](mailto:dtestravel@jcu.edu.au) for processing.

Please Note: Expenses relating to private travel or that are not incidental to your trip will not be reimbursed



## **Corporate Travel Management**

Office Hours: Monday to Friday, 0800 to 1800 hours

Phone: 1300 546 094

Email: [jcu@travelctm.com](mailto:jcu@travelctm.com)

24 Hour Emergency: Toll Free 1800 663 622

## DTES TRAVEL REQUIREMENTS

- Determine if travel involves a field trip (see below definition)
  - **If yes:** consult blue field trip columns in Table 1 (domestic) or Table 2 (International) for travel requirements.
  - **If no:** consult black travel columns in Table 1 (domestic) or Table 2 (International) for travel requirements.

Note: a risk assessment in riskware is required for all field trips and for all international travel where the DFAT travel warning is “reconsider

- **Field trip definition:** Any approved work / activity for the purpose of work, study or research that is conducted by JCU staff, postgraduates and undergraduate students and volunteers at various field sites which are off campus. This includes urban, rural, terrestrial, freshwater, marine or remote locations.
- **Remote field trips:** those that occur in locations where medical assistance cannot be provided within half an hour in an emergency situation due either to location, time or nature of field trip.
- **The following types of travel are not considered field trips:**
  - i. Inter-campus travel (Townsville, Cairns, Singapore)
  - ii. Visits to urban office locations
  - iii. Non-campus meetings (\*except in remote areas)
  - iv. Attending conferences
  - v. Visits to urban areas where participants are considered to be an audience
  - vi. Location reconnaissance in an urban area
  - vii. Travel within an urban area
  - viii. Travel to research stations for non-field or laboratory work (eg meetings/maintenance work on buildings)

travel” or above.

## DOMESTIC TRAVEL REQUIREMENTS

	DOMESTIC FIELD TRIP		DOMESTIC MEETING/CONFERENCE*	
	STAFF	STUDENTS	STAFF	STUDENTS/GUESTS
<b>Submission method</b>				
FRAEDOM TRAVEL REQ	✓***	n/a	✓	n/a
TRAVEL REQUEST FORM (dtes.travel@jcu.edu.au)	n/a	✓	n/a	✓
<b>Supporting documentation**</b>				
RISK ASSESSMENT (Riskware)	✓	✓	n/a	n/a
FIELD TRIP MODULE APPROVAL	✓	✓	n/a	n/a
FIELD TRIP MODULE RECORD	✓	✓	n/a	n/a

## INTERNATIONAL TRAVEL REQUIREMENTS

	INTERNATIONAL FIELD TRIP		INTERNATIONAL MEETING/CONFERENCE*	
	STAFF	STUDENTS	STAFF	STUDENTS
<b>Submission method</b>				
FRAEDOM TRAVEL REQ	✓***	n/a	✓	n/a
TRAVEL REQUEST FORM (dtes.travel@jcu.edu.au)	n/a	✓	n/a	✓
<b>Supporting documentation**</b>				
RISK ASSESSMENT (Riskware)	✓	✓	ONLY For DFAT level: “reconsider travel” or “do not travel”	ONLY For DFAT level: “reconsider travel” or “do not travel”
FIELD TRIP MODULE APPROVAL	✓	✓	n/a	n/a
FIELD TRIP MODULE RECORD	✓	✓	n/a	n/a
Smart Traveller DFAT advice	✓	✓	✓	✓
Statement confirming travel to areas classed as “Reconsider your need to travel” or “Do not travel”	✓	✓	✓	✓
Travel Justification Statement	ONLY For DFAT level: “reconsider travel” or “do not travel”	ONLY For DFAT level: “reconsider travel” or “do not travel”	ONLY For DFAT level: “reconsider travel” or “do not travel”	ONLY For DFAT level: “reconsider travel” or “do not travel”

\* not including research related activities (biological or environmental sampling, boating/diving, four wheel or off road driving etc).

\*\* Supporting documentation to be attached to travel request submission, either in Fraedom (staff) or via email to [dtes.travel@jcu.edu.au](mailto:dtes.travel@jcu.edu.au) (students and guests)

\*\*\* When submitting a Fraedom trip for a Field Trip, ensure that the “Description” includes the words “field trip”

# How to attach travel documentation to Freedom Travel Request

1. Complete your Freedom Travel Requisition as per the instructions at [https://www.jcu.edu.au/student-services-directorate-internal/resources/business-process-library/how\\_to2/jcu\\_148253.pdf](https://www.jcu.edu.au/student-services-directorate-internal/resources/business-process-library/how_to2/jcu_148253.pdf)
2. At Step 20, on the *Coding* tab you will need to attach your travel documentation as per the *DTES Travel Requirements*.

Expense Type	Coding	Summary	Approval
Orgu.Project.Fund	Use Code	Amount Incl	GS
Line 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Line 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Line 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Line 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
More..	Balance	<input type="text"/>	<input type="text"/>

Expense Description

demo international

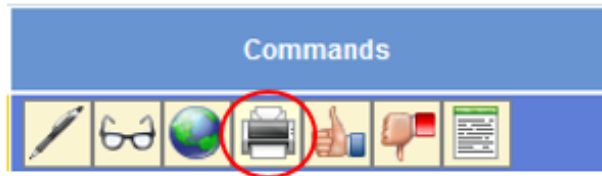
Attach documents here

3. Continue through the subsequent steps to complete and submit your travel requisition.

## Attachments

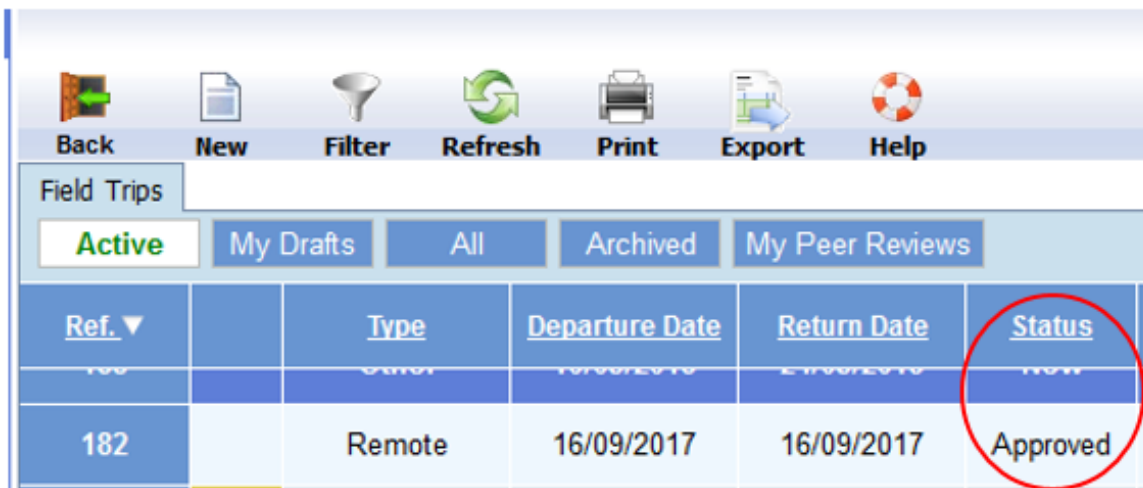
### Field Trip Record

To print a Field Trip from the Field Trip Register, go to the right hand column called 'Commands' and select the 'Print Field Trip' icon.



### Field Trip Approval

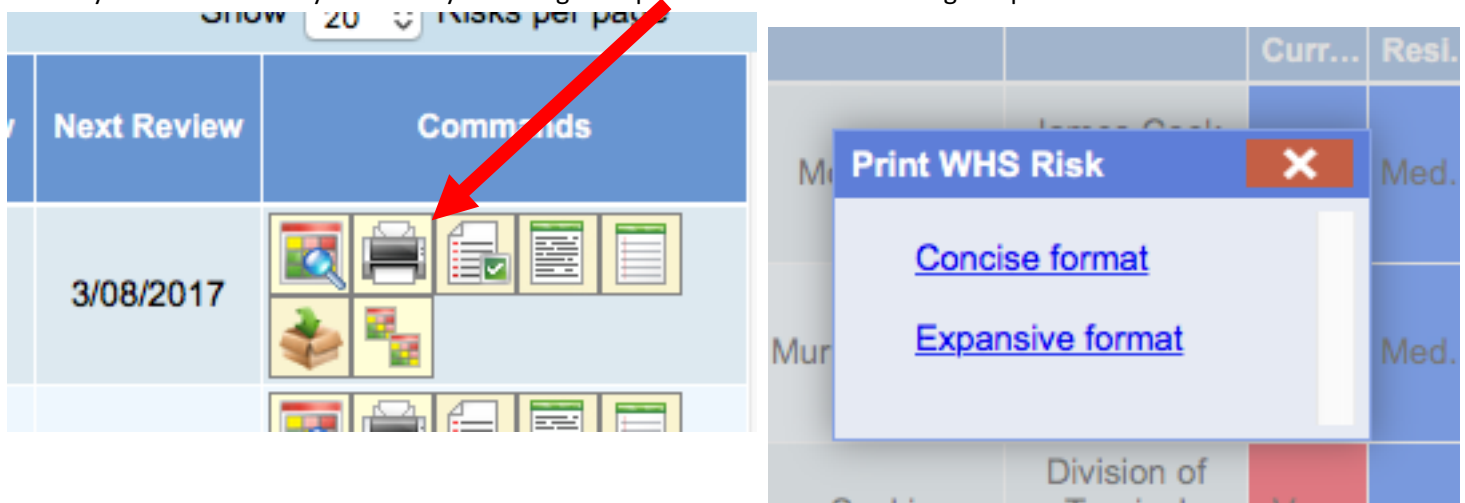
Take a screen shot of the Field Trip Register, identifying the Approved field trip in the status column.



Ref. ▼	Type	Departure Date	Return Date	Status
182	Remote	16/09/2017	16/09/2017	Approved

### Riskware Record

Attach your riskware entry. Do this by selecting the "print" button and choosing "expansive format".



The screenshot shows a table with a 'Next Review' column containing the date '3/08/2017'. To the right of the table is a 'Commands' menu. A red arrow points to the printer icon in the 'Commands' menu. A dialog box titled 'Print WHS Risk' is open, showing two options: 'Concise format' and 'Expansive format'. The 'Expansive format' option is selected.

**DFAT Information:**

Go to: <http://smartraveller.gov.au/Pages/default.aspx>

Navigate to the country you are travelling to and take a screen shot of the “Advice Levels”.

## Advice levels

Papua New Guinea overall, exercise a high degree of caution	▼
Porgera Township, reconsider your need to travel	▼
Tari in Hela Province, reconsider your need to travel	▼

**Travel Justification Statement**

Create a word document and type in a statement about why this travel has to occur to this destination at this time. What other destinations have been considered? What other travel periods have been considered?

Save the document as a PDF.

**Statement confirming no travel to areas classed as “Reconsider your need to travel” or “Do not travel”**

Create a word document and type in a statement confirming that you are not travelling to areas classed as “reconsider your need to travel” or “do not travel”.

Example statement:

*I can confirm that during my trip to Papua New Guinea scheduled for Jan 15 – Feb 20 I will not be travelling to any areas classed as “reconsider your need to travel” or “do not travel”*

OR

*I can confirm that during my trip to Papua New Guinea scheduled for Jan 15 – Feb 20 I will be travelling to the Porgera Township which is currently classed as “reconsider your need to travel”. My risk assessment includes additional measures to mitigate the risks of travelling in this area.*

Save the word document as a PDF

# Travel Request Form

Part 1 - Complete Prior to Departure

This form is to be completed by students, guests and officers in charge only. Staff must use Spendvision.

## Traveller Details

**Full Name** \_\_\_\_\_  
**School / Office** \_\_\_\_\_  
**Type of Traveller** \_\_\_\_\_  
**Phone Number/s** \_\_\_\_\_  
**Email Address** \_\_\_\_\_  
**Student Number** \_\_\_\_\_  
**Reason for Travel** \_\_\_\_\_  
**Trip Tracker Number** \_\_\_\_\_  
**Number of Attendees** \_\_\_\_\_ See page 4 for instructions on how to list attendees

## Emergency Contact Details

**Contact Name** \_\_\_\_\_  
**Relationship** \_\_\_\_\_  
**Daytime Contact** \_\_\_\_\_  
**After Hours Contact** \_\_\_\_\_  
**Mobile Number** \_\_\_\_\_

Dept	Date	Origin Country	Origin City	Travel Method	Arrival Date	Destination Country	Destination City

Will this trip include a component of private travel? No \_\_\_\_\_

Expense Code - Description	ORGU	Project	Fund	Budget Amount	Office Use Only		
					GST?	Payment Method	Date Paid

## Comments

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## **\$0.00 Budget Total**

\$0.00 Advance Before Travelling  
 \$0.00 Reimburse Prior to Travel  
 \$0.00 Creditor Payment  
 \$0.00 Reimburse Upon Return

Please contact your Faculty/School Travel Officer to organise payments to be made on the corporate credit card (e.g. Accommodation).

Please contact your Faculty/School Travel Officer if you will require an advance or reimbursement.

Traveller	Acct Holder/Supervisor	Travel Approver	Overseas Travel Approver
_____	_____	_____	_____
Signature	Signature	Signature	Signature

Officer Name _____	Office Use Only _____	Accounts Payable to Pay Traveller _____
Travel Req Number _____		Advance Before Travelling _____
Date Sent to AP _____	Display Fin1 Entry _____	





# Private Travel

The University will not pay for any personal or private expense incurred while undertaking University travel.

Where an amount charged to the University is deemed to be private and also includes GST, the amount repaid to the University must be calculated on the GST-inclusive cost. Such repayments will therefore include GST.

Please indicate below the Private component included in this travel that has been paid for by the University (Incidental Private Travel can be ignored).

\*(GST Inclusive)

\* Where an amount is shown above, a Receipt must be attached that shows that this amount has been repaid to the University.

# Travel Diary

Any Non-Staff or Student must keep a Travel Diary for travel that includes an element of Private Travel.

The Location of Activity should indicate, at a minimum, the city and country that the main activity is/was undertaken.

Complete the Travel Diary for each day of travel inclusive of weekends and private travel component. Where the nature of the activity is the same for a period of days (eg. Attend Conference for 3 days), the traveller may complete one line of the itinerary for that period of time. Where there is more than one activity on a day (eg. Attend Seminar and Attend Meeting), each different activity for that day must be entered on a separate line.

NATURE OF ACTIVITY	START DATE	START TIME	FINISH DATE	FINISH TIME	LOCATION OF ACTIVITY

# Checklist

Receipts Attached?      
 Conference Registrations Attached?      
 Private Motor Vehicle Usage Form Attached?   
 Itinerary / TMC Invoice Attached?      
 Course Attendee List Attached?



**PRIVATE VEHICLE DETAILS**

Make	Model	Year	Body Type	Registration Number	State Registered
					Queensland
Is the vehicle salary sacrificed under a University FRP (If Yes, payment CANNOT be claimed)?					
Why is it necessary to use a private vehicle?					

**DRIVER DETAILS**

Do you have a valid Australian driver's license?	
Do you have a valid vehicle registration?	
Do you have a valid full vehicle comprehensive insurance policy?	
If any of the above three questions are answered "No", then the private vehicle can NOT be used for any JCU related business travel.	

**DISCLAIMER:**  
 The University is not liable for any loss, damage or expense suffered or incurred by any person arising out of or in connection with the use of the private vehicle for business travel.  
 Travellers must ensure that their vehicle is covered for business travel.  
 In the event of an accident involving a private vehicle whilst on University business, any insurance claim which may arise must be made through the vehicle owner's insurers. It is NOT possible for any insurance claims to be made under the University's insurance policies.

**ESTIMATION OF PRIVATE MOTOR VEHICLE EXPENSES**

<b>Option 1 Mileage Allowance (Use Code 7619)</b>	<b>A. Cents Per Kilometre</b>				
	Origin	Destination	Distance (km)	Cents/Kilometre	Estimate
					\$0.00
	<i>Useful estimation tool - RACQ Trip Planner website</i>				
	<a href="http://www.racq.com.au/travel/Maps_and_Directions/trip_planner_2">http://www.racq.com.au/travel/Maps_and_Directions/trip_planner_2</a>				
	<i>For current cents per km rates refer to Mileage Allowance on Travel Webpage</i>				
	<a href="http://www.jcu.edu.au/policy/finance/expenses/JCUPRD_037508.html">http://www.jcu.edu.au/policy/finance/expenses/JCUPRD_037508.html</a>				
<b>Lower of A and B</b>	<b>B. Cheapest Air-Fare of the day (where one exists)</b>				
	Origin	Destination	Airline	Estimate	
	Attach proof (e.g. quote from on-line booking tool - WTP)				
				Lower of A and B:	<b>\$0.00</b>
<b>Option 2 Fuel Reimbursement (Use Code 8015)</b>					Estimate:

**NOTE:** A Vehicle log must be completed for the actual claim in Part 2

**DECLARATION**

I declare that the information provided on this form is true, correct and complete and will notify JCU of any changes:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full Name	JCU ID Number	Signature	Date

**Authorisation**

I Authorise the use of the private motor vehicle for JCU travel based on the information provided above:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full Name	Position	Signature	

**PRIVATE MOTOR VEHICLE USAGE CLAIM FOR JCU BUSINESS TRAVEL - PART 2**

On return from your trip, complete and forward this form for payment of private motor vehicle usage

Please be aware that a lot of information is required to complete this form. Failure to supply all required information will result in delayed payment and claims may be returned for further information.

1. POSTING CODE		
ORGU	PROJECT	FUND

2. CLAIM METHOD (Please Select One)	
1. Mileage Allowance	Complete Sections 3 and 5 Below
2. Fuel Reimbursement	Complete Sections 4 and 5 Below

**3. MILEAGE ALLOWANCE (USE CODE 7619)**

- Kilometres for the trip should not include the normal daily distance from your home to your usual work campus and return.
- Payment of Mileage Allowance into the next salary run will occur if this form is received by the Salaries Section before the Wednesday of the week before payday. JCU do not take responsibility for delayed payments due to incomplete documentation submitted by the traveller.
- Mileage Allowances paid will appear on your Payment Summary (Group Certificate).

VEHICLE MILEAGE LOG								
Date		Venue/s or Person/s Visited	Purpose of Visit	Odometer Readings		Total Trip Distance (Kilometres)	Usual KMs Travelled To and From Work (Daily)	KMs Claimed
Start	End			Start	End			
						0		0
						0		0
						0		0
						0		0
						0		0
						0		0
						0		0
						0		0
<b>Total KMs Claimed:</b>								0

LOWEST OF A AND B:			
<b>A. Cents Per Kilometre</b>	Total Kilometres Claimed	Cents/Kilometre	Actual Amount
	0		\$0.00
<b>B. Cheapest Air-Fare of the day (where one exists)</b>	As per Private Motor Vehicle Usage Claim - Part 1		
	Lower of A and B:		<b>\$0.00</b>

**4. FUEL REIMBURSEMENT (USE CODE 8015)**

MUST ATTACH FUEL RECEIPTS.  
Please allow 7 business days upon submission for payment by Accounts Payable. JCU do not take responsibility for delayed payments due to incomplete documentation submitted by traveller.

<b>Receipts Total:</b>	
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**5. DECLARATION**

I declare that the information provided on this form is true, correct and complete and will notify JCU of any changes:

Full Name	JCU ID Number	Signature	Date

**6. TRAVEL OFFICER VERIFICATION**

I Verify that:  
The Part 2 claim total is no greater than the approximation made on Part 1; OR  
The travel requisition part 2 has been approved by the correct authoriser for the increase in expenditure;

Full Name	Position	Signature	

## Steps to Request a Travel Profile

Travel profiles are now requested through the JCU Service Now Portal. This can be found on the JCU Staff Homepage (you can access this from the JCU homepage - look for the menu at the top "Staff" and "Staff Homepage").

Select "Log a Service Request"

Log in using your JC number and password Select "Log a new Finance Request"

Select "Travel and Corporate Credit Card"

Click "Traveler Online Booking Tool"

Complete the required details for the traveller.

Allow one week for the profile to be created.

**James Cook University  
Australian Student Account Details Form**

**Student Number** \_\_\_\_\_

**Student Full Name** \_\_\_\_\_

**Phone Number** \_\_\_\_\_

**Email Address** \_\_\_\_\_

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**Bank Account Name** \_\_\_\_\_

**Bank Name** \_\_\_\_\_

**BSB** - \_\_\_\_\_

**Bank Account Number** \_\_\_\_\_

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**Student Authorisation - Mandatory**

**Signature** \_\_\_\_\_

**Full Name** \_\_\_\_\_

**Date** \_\_\_\_\_

*Please scan and email all signed forms to: [accountspayable@jcu.edu.au](mailto:accountspayable@jcu.edu.au)*

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**Privacy Statement**

James Cook University recognises the importance of protecting your personal and sensitive information and is bound by the Privacy Private Sector Act 2000. The above mentioned information is collected for the express purpose of ensuring payments for invoices you are electronically transferred to your nominated bank account. The information contained in this form will not be disclosed. Full details of the University's Privacy Policy are available at:

[http://www.jcu.edu.au/policy/allitoz/JCUDEV\\_005373.html](http://www.jcu.edu.au/policy/allitoz/JCUDEV_005373.html)

