Business Travel and Expenses Policy

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1 Purpose and scope

1.1 This policy sets out principles and requirements for claiming travel and other expenses incurred wholly, exclusively and necessarily in the course of carrying out De Montfort University (University) business, including the use of corporate credit cards. It does so in a fair and transparent way, so that anyone needing to incur expense can understand which claims are permitted and what steps must be taken to ensure reimbursement.

1.2 This policy applies to all persons working for or on behalf of the Un ust be tak (k)4 (i)6i (es)45 0 Tdat

- Compliance checks of expenses claimed and credit card usage are undertaken. It is your responsibility to act with honesty and integrity in the application of this policy.
- Summaries of expenses of University Leadership Board (ULB) members are published quarterly

2.3.3 **The sustainability principle**

Travel and face to face meetings can be an important tool to the University in meeting its objectives, however they also have an impact on the University's strategic commitment to sustainability and the United Nations Sustainable Development Goals (SDGs) which seek to deliver prosperity for all while protecting the planet from climate change.

- The University is committed to reducing its carbon footprint and has set itself the goal of being a net zero carbon university by 2032 for energy related emissions and 2045 for all emissions. All business travel and expenditure incurred on behalf of the University should fully consider the environmental impact of travel choices, 'the gel /9 (gel)6 (/9 (gel)6 (/9 (gel)6 -0.002 Tw 86[Get)2.1 (

3 Travel: general provisions

3.1 Safety and wellbeing

3.1.1 Safety, wellbeing and security are particularly important when travelling. This policy reflects the importance of these considerations and allows judgement to be made based on the circumstances, such as the mode of transport or the location of the hotel. If in doubt, you should always take the safer option.

3.1.2 The Foreign, Commonwealth & Development Office (FCDO) provides advice about risks of travel to help individuals make informed decisions. We recommend that the FCDO foreign travel advice is reviewed prior to booking. The University's travel insurance will not cover areas where the FCDO advises against travel.

3.2 Risk Management and Insurance

3.2.1 As a condition of the University's travel insurance and the University's duty of care towards its staff, it is essential to consider health and safety, occupational health, vaccinations/medications, entry requirements and high-risk locations including countries that are sanctioned.

3.2.2 Staff must complete the **Travel Risk Assessment form** for any travel taking place outside of the UK. A risk assessment is not required for travel within the UK unless you and your manager consider there to be a higher risk. Full details of the health and safety risk assessment procedures and further advice/guidt o n o a can t n h

3.7 Returning to Work After a Travel Incident/Emergency

3.7.1 Where an emergency or incident occurs while travelling, the relevant University Leadership Board member in the case of University staff, and the Vice Chancellor or Chair of the Board in the case of Chancellor and Governors, in conjunction with the immediate line manager and HR adviser (where relevant), will take the lead role in coordinating appropriate activity to support affected staff. The type of support required will be determined on a case-by-case basis and a case team may need to be convened to consider the needs of affected staff at the earliest opportunity following the immediate crisis situation occurring. The case team may include an occupational health adviser, particularly where the case is sensitive and needs to remain confidential

3.7.2 Support is available from Occupational Health who are able to secure external counselling support where appropriate. DMU staff are also able to access support through the Employee Assistance Programme.

3.7.3 Any absence from work associated with an incident or emergency whilst either still travelling or upon return to DMU should be managed in the usual way and according to the relevant Policy.

3.7.4 It is particularly important following emergency situations that the scenario be reviewed to ensure that any lessons learned about the communication and handling of the situation are documented and to inform any future emergency situations.

4 Expense claim essentials

4.1 Travel management company – for travel bookings

4.1.1 The University has retained the services of a dedicated Travel Management Company

4.4 **Approving claims and approvers responsibilities**

4.4.1 The following are approvers for expense claims:

- Line Manager– DMUhub claims in all areas except for research and other projects
- Responsible Person - DMUhub claims for research and other projects
- Authorised Signatories (Line Manager/Responsible Officer) for all paper-based expense claims see Appendix A.

4.4.2 Throughout this policy, where approvals refer to senior staff, it is expected that for University Leadership Board Members, this would be the Vice Chancellor or the University Leadership Board members' manager. In the case of the Vice Chancellor, this would be the Chief Finance and Resources Officer.

4.4.3 Before approving an expense item, you must ensure promptly that it:

- complies with this policymustT0 TcTdiTcu-12nE(0.4)3.0w0.425 0 Td[(1)-4(9)-34(0)]

5 Flights

5.1 Booking flights

- All flights must be booked through the University's travel provider portal, which is available on a 24/7 basis. This provides the University access preferential rates and contractual terms, facilitate efficient booking of travel requirements, and providing visibility of itineraries for security reasons
- Book tickets as early as possible for reduced advance fares that may be available
- To support the university's carbon reduction commitments staff should avoid the use of air travel for travel within Great Britain, with a limited number of exceptions as follows:
    - For journeys to locations out with mainland Great Britain, including to islands

		x Where no cheaper ticket o…native travel option…ilable x where travel is overnight o… you are starting w…mediately after the journey, business…possible for your itinerary to include…uate time for rest after landing and before any business meet…

- The University will not reimburse First Class flights, …t where an airline…ly has two classes and describes Business as 'First', (e.g. intern…s in the US) …propriate consideration for disability and accessibility needs.
- In exceptional circumstances where tionci8[ex)4 (c)4 (ep)1. (e)…(4)…(e)4 ≤006c 0.00 (ca) -4 (iv0 T

6 Public Transport

6.1 Booking rail tickets

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7.3.2 Overseas Hotels
Where you are

8 Taxis, car hire and mileage

Where safe and practical to do so, use public transport in preference to taxis, car hire or use of own vehicle for business travel.

- In the case of shared journeys, in addition to

10 Business Hospitality

10.1 This section must be read in conjunction with the Finance - Gifts and Hospitality Policy which covers situations where staff receive or provide.

- The expense of solely entertaining colleagues (i.e.

- Where an individual attends a University business related conference, the fees for the conference can be claimed, along with business expenses incurred whilst attending the conference. Any overnight accommodation, and travel to the conference should be booked in accordance with this policy, except for combined conference and te s0 0 6.H1.04 746.5420Tm(

13.3 Currency

- Where required pre-approved currency cash advances

Appendix C: Cash Advances Process

Appendix D: Travel Expenses Exception Form

Name	
Faculty/Directorate (include Line Manager details)	

Date(s)

Appendix E:
Corporate Credit Card (Cardholder) Statement of Responsibility

Cardholder Name		**Cost Centre**	
Position		**Faculty**	

Approval has been granted to issue you with a University corporate credit card. This card has been issued on the condition that you will, at all times, comply with the requirements stipulated below.

Staff issued with a corporate credit card are being entrusted in regard to the use of public funds.