 <p>BAY OF PLENTY DISTRICT HEALTH BOARD HAUORA A TOI</p> <p>STAFF TRAVEL & ACCOMM PROTOCOL</p>	<p>STAFF TRAVEL & ACCOMMODATION - STANDARDS</p>	<p>Policy 2.3.3 Protocol 1</p>
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STANDARDS TO BE MET


1. General

- a) Bay of Plenty District Health Board (BOPDHB) work related travel must be consistent both in type and value with generally accepted business practices.
- b) The most cost effective means of transport must be used. Any unapproved costs incurred will be a cost to the employee.
- c) All travel applications must be approved by the Manager for all employees including part time staff i.e. delegated authority for the relevant cost code.
- d) Managers are responsible for ensuring their staff comply with this policy and that expenses are reasonable. Breaches may result in disciplinary action being taken.
- e) All work related travel requires the prior written approval of the employee's Manager, unless reimbursement is in accordance with a provision in their employment contract.
- f) Only reasonable expenses for meals will be reimbursed and original itemised receipts must be attached to the expense claim.
- g) When no fleet vehicle is available use of private motor vehicles on company business will be reimbursed in line with the employee's contract.
- h) All travel, accommodation and rental car reservations must be made through the Transport Co-ordinator using the Request for Travel and / or Accommodation form. Where possible bookings will be with BOPDHB's preferred suppliers. This however does not preclude an employee staying at the venue of a conference if the cost is within a reasonable range.
- i) Where a supplier offers ancillary benefits for the personal use of an employee these offers are to be declined in preference to a discounted price for the service or goods to be provided.
- j) Provided that no additional cost results to BOPDHB, approved annual leave may be incorporated into periods of work related travel. Any additional personal travel and accommodation whether related to the annual leave or not is at the cost of the employee.
- k) Alterations and cancellations are to be made through the Transport Co-ordinator wherever practical. This is to ensure a credit is received for the unused reservations. Failure to cancel may incur costs to the employee.

2. Travel

- a) Travel arrangements should be made as early as possible to take advantage of advance purchase discounts or special fares where applicable.
- b) Advantage should be taken of off peak flights if possible and consideration needs to be given to the issue of advantage / risk of non-refundable flights.
- c) Payment for excess baggage other than that belonging to the company is the responsibility of the employee.
- d) A spouse may accompany an employee at their own cost and their travel and accommodation booked through our preferred supplier at the time, who will invoice the employee accordingly.
- e) International Travel:
 - i. Overseas travel must have prior approval of the General Manager of the employee's service and then be authorised by the Chief Executive Officer (CEO) and / or Chief Operating Officer (COO).
 - ii. All international flights are to be economy class unless on medical grounds

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<p>Protocol Steward: Transport Co-ordinator</p>	<p>Authorised by: General Manager, Corporate Services</p>	

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3. Accommodation

- a) Hotel or motel rooms are to be moderately priced single standard rooms, not of a luxury standard.
- b) The cost of accommodation only will be paid.

4. Rental Cars

- a) Rental cars may be used for business travel where that is the most cost effective means of transport and must be approved in advance by a General Manager.
- b) Rental vehicle may not be used for personal travel (this would raise Fringe Benefit Tax issues).
- c) The class of vehicle used must be appropriate for the number of persons travelling and the distance to be travelled.
- d) Cancellation must be made by phoning the Transport and Travel Coordinator, before the first day of the reservation to avoid a no-show charge. No-show charges are to be paid by employees and are not reimbursable.
- e) Within New Zealand, the BOPDHB insurance covers accidental damage to rental vehicles used by BOPDHB employees on authorised company business so rental company insurance is not required.
- f) In the case of an accident the policy excess will be charged to the cost code of the employee the vehicle was hired to.

5. Expense Claims

- a) All travel expenses incurred must be submitted for approval on the appropriate forms and all associated documentation, including itemised receipts, must be original copies, photocopies are not accepted.
- b) Personal credit cards are to be used for miscellaneous expenses (meals, taxis etc) where possible and claimed using the expenses reimbursement process. Original itemised receipts are required.

6. Travel Insurance

- a) International travel insurance for work related travel is covered by BOPDHB, this can be completed online by the Traveller see Transport for the link.
- b) Employees can arrange their own cover for domestic travel, if required.
- c) BOPDHB will not reimburse the cost of travel insurance incurred in addition to its own policy.
- d) Travel insurance must be approved by the applicants Manager.

7. Non-Reimbursable Expenses

- a) Examples of expenses which are not reimbursable are (but not limited to):
 - Fines for traffic and parking violations and towing fees
 - Any illegal use of a motor vehicle (including speeding)
 - Movies (in flight, hotel room or cinema)
 - Cost of ancillary and optional recreational activities associated with a conference
 - Personal expenses incurred as a result of being away on company business such as baby-sitting fees, lawn care, care of pets
 - Barber or hairdressing services
 - Health club or gym fees
 - Luggage or briefcases, toiletries or clothing
 - Suit hire costs
 - Laundry costs

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- Office supplies
- Other personal costs such as personal postage, sightseeing, entertainment, show or cinema tickets or private travel while on a business trip.

ASSOCIATED DOCUMENTS

- Bay of Plenty District Health Board policy 2.3.3 Staff Travel & Accommodation
- Bay of Plenty District Health Board policy 3.1.1 Delegations
- Bay of Plenty District Health Board policy 2.3.6 protocol 1 Expense Claims – Employees
- Bay of Plenty District Health Board Travel and Accommodation Request Form

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