

## POLICY ON TRAVEL, ACCOMMODATION AND RELATED EXPENSES

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## A. GENERAL PRINCIPLES

### 1. PREAMBLE

- 1.1 This policy sets out guidelines regarding travel and accommodation arrangements for UNISA officials, employees, SRC members, office bearers or other authorised persons whilst away on official duty. UNISA officials should deal with the financial resources of the University prudently and the necessity of all travel, accommodation and related expenses should be carefully considered before being incurred.
- 1.2 UNISA recognises the needs of its officials who have disabilities, and pledges to respond to their specific travel and accommodation needs.
- 1.3 Mindful of the principles of the King IV Report on Corporate Governance for South Africa 2016, the United Nations Global Compact and the need for sustainability, UNISA will make its travel arrangements in a manner to which minimises its consumption of paper and limits its carbon footprint.

### 2. OBJECTIVES

- 2.1 To provide timely and reasonably priced travel and/or accommodation arrangements for UNISA officials.
- 2.2 To set out the rules and authority levels for UNISA officials.

### 3. APPLICATION

This policy applies to all UNISA officials, employees, SRC members, office bearers or other authorised persons who undertake official business travel.

### 4. CENTRALISED SYSTEM

- 4.1 UNISA has a centralised travel office and an officially appointed travel agent.
- 4.2 All requests for travel, accommodation and car rental services must be channelled through the travel office.
- 4.3 Prior to departure, the travel office will arrange accommodation, airline tickets, and car rental and other official means of transport.

### 5. OFFICIAL CREDIT CARDS

It is the policy of UNISA not to issue official credit cards to any of its officials.

### 6. DEFINITIONS

Accommodation cost refers to the direct costs of accommodation and parking (if applicable) at the place of accommodation;

Categories of UNISA officials are the following:

#### Category 1

Chancellor, external Council members, Principal and Vice Chancellor and guests holding similar offices;

## **Category 2**

Vice Principals, Registrar, Deputy Registrars, Executive Directors, Executive Deans, Deputy Executive Deans, Deputy Executive Directors and guests holding similar offices;

## **Category 3**

All other employees, including guest lecturers and SRC members.

Common monetary areas	refers to South Africa, Lesotho, Namibia and Swaziland;
Daily allowance	is payable when a UNISA official does not stay overnight, but is absent from the office for longer than eight hours and travels more than 100 km from the official work place. This amount is subject to an annual review;
Domestic travel	consists of travel to any destination within South Africa and common monetary areas;
Frequent flyers loyalty programme	refers to UNISA officials with a frequent flyer membership registered with UNISA's Section: Travel and Accommodation Management;
Incidental costs	are personal, incidental expenditures incurred which directly relates to the official duty for which the business travel is undertaken (e.g. laundry, personal telephone calls, newspapers, drinks, tips, etc.);
International travel	is travel to any destination outside the borders of South Africa and the common monetary area;
Local travel	is any distance not exceeding 100 km from the place of work;
Management committee members	are, for the purposes of this policy, the Principal and Vice Chancellor, Vice Principals and Registrar;
National travel	refers to a distance that exceeds 100 km but is still within South Africa's national borders;
Official duty	entails a trip or visit by an official who is duly authorised to attend a particular event (e.g. conference, congress, symposium, course or group discussion) or perform a duty in the interests of UNISA.  Approval must be obtained by the relevant responsibility centre manager (or in the case of the responsibility centre manager by the immediate line manager) before the trip or visit is undertaken;
Research travel	is travel undertaken by a UNISA official in pursuit of academic research or other official research relevant to UNISA business;
SARS	means the South African Revenue Service;
SRC member	refers to an elected office bearer of the Student Representative Council (SRC);

Subsistence allowance is an amount paid to a UNISA official on official duty for each overnight stay during which the person is absent from his/her usual place of residence. This amount is paid in respect of meals and other incidental costs not paid for directly by UNISA. The amount as specified may be revised from time to time;

Travel costs	refer to the direct cost of transportation used by an official on official duty. Please note that traffic fines are not considered part of travel costs, and are for the personal account of the official;
UNISA official	refers to any person employed by UNISA, including SRC members, Council members, other duly authorised persons acting on behalf of the University, as well as candidates invited for job interviews or panel/committee members acting on behalf of the University;
Venue booking	refers to a place off-campus, hired for an official meeting, conference, team-building exercise, training or other official business.

## **7. EXECUTIVE AUTHORITY**

- 7.1 In exceptional circumstances, transactions that do not conform to the provisions and limitations of this policy may be authorised, provided that each transaction is subject to authorisation in terms of the Policy on Delegation of Authority.
- 7.2 A quarterly report giving details of exceptions must be forwarded to the Management Committee.

## **8. CHANGE CONTROL**

Any change to this policy must be effected in accordance with the University's accepted procedure.

## **9. POLICY VIOLATION**

Any UNISA official who does not adhere to this policy will be subject to disciplinary action.

# **B. RESPONSIBILITY FOR TRAVEL AND ACCOMMODATION RESERVATIONS**

## **10. RESPONSIBILITY**

- 10.1 All requests for travel and accommodation must be made through UNISA's Section: Travel and Accommodation Management in the Supply Chain Management Directorate.
- 10.2 UNISA officials are personally responsible for ensuring that their travel arrangements meet travel regulations and that their claims for reimbursement are accurate.

## **11. AUTHORISATION FOR DOMESTIC AND INTERNATIONAL TRAVEL AND ACCOMMODATION**

- 11.1 Travel and accommodation must be authorised and approved by the relevant official signatories in each responsibility centre, in accordance with the Policy on Official Signing Powers.
- 11.2 It is essential that this authorisation be obtained **before** the trip is undertaken.
- 11.3 A proper motivation must be submitted to the authorising signatories for their approval.
- 11.4 The special needs of UNISA officials with disabilities need to be stated in writing and approved by the relevant signatories in each responsibility centre. Such needs must be clearly stated to enable UNISA's Section: Travel and Accommodation Management to make appropriate arrangements. Officials are required to submit at least once a year a medical certificate - unless the condition is considered to be permanent as per the medical certificate.

- 11.5 Official signatories must not approve travel and accommodation for themselves, but must obtain approval from their line manager or the duly authorised responsibility centre manager of the applicable budget.
- 11.6 International travel and accommodation must be approved by the relevant line manager, Executive Director or Dean, and the Management Committee member responsible for the portfolio **before** the trip is undertaken.<sup>1</sup>
- 11.7 International travel for the Chairperson of Council must be approved by the Executive Committee of Council.
- 11.8 International travel by category 1 officials must be approved by the Chairperson or Deputy Chairperson of Council and the Principal and Vice Chancellor through a pre-approved travel plan.
- 11.9 International travel for category 2 officials must be approved by the Principal and Vice Chancellor, or Vice Principal according to cluster.

## **12. AUTHORISATION FOR RESEARCH TRAVEL**

- 12.1 Authorisation for all travel funded for research purposes must be approved in accordance with the University's Policy on Grants from Research Funds.
- 12.2 A request will not be processed without accompanying validation of budget availability.

## **13. FUNDING**

Every responsibility centre must budget annually for domestic and international travel, accommodation and related expenses according to the budgetary guidelines.

## **14. DAILY ALLOWANCE**

- 14.1 The daily allowance is payable when an official is on official duty for a period exceeding eight hours and travel to a destination in excess of 100 km from his/her official place of work.
- 14.2 The daily allowance is payable when there is no overnight stay and is taxable. (When attending seminars or functions where meals are provided, no daily allowance will be paid.) However, where no meals are provided, the daily allowance is limited to meals only.
- 14.3 No daily allowance will be paid to employees choosing not to stay overnight.

## **15. SUBSISTENCE ALLOWANCE**

- 15.1 A subsistence allowance is an amount paid to a UNISA official on official duty for each overnight stay during which the person is absent from his/her usual place of residence.
- 15.2 As per the SARS ruling, the subsistence allowance paid is not subject to PAYE, but will be reflected in full on the annual IRP5 tax certificate.
- 15.3 This amount is paid in respect of meals and other incidental costs not paid for directly by UNISA.
- 15.4 If the allowance claimed and paid is limited to the rate determined by the SARS, no proof of expenditure is required. However, if the allowance claimed exceeds the SARS rate, documentary proof of expenses must be provided for the purposes of re-imbusement.

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<sup>1</sup> Refer to paragraph 13 for authorisation of research travel.

## **16. TOP-UP FUNDING**

In case the UNISA official want to top-up for other leisure activities, no top-up funding will be allowed from other funds such as centre funds, departmental funds or research output funds, unless from the UNISA official's own pocket.

## **17. NATIONAL RESEARCH FOUNDATION (NRF) AND OTHER EXTERNAL GRANTS**

- 17.1 Grant holders, using grants for travel, may arrange their own travel bookings in accordance with the provisions of this policy, including medical insurance for international travel, and may claim reimbursement of these costs by submitting receipts or proof of payment.
- 17.2 Grant holders are not entitled to utilise UNISA pool vehicles and may use their own or a rented vehicle.
- 17.3 In cases where researchers made their own bookings for flights and accommodation, requests for re-imbursement will only be paid upon submission of an e-ticket and proof of accommodation.
- 17.4 No advances will be paid to grant holders who prefer to make their own travel and accommodation arrangements.
- 17.5 The re-imbursement for travel insurance will be limited to the dates of official travel and must be indicated as such on the submission.
- 17.6 Grant holders may only utilise the funds for official business. Supporting documentation, (e.g. conference documentation, formal invitations and research proposals) must be attached to the application and must be approved by the Chairperson of the Department, Director: Research Support and Vice Principal: Research, Postgraduate-Studies, Innovation and Commercialisation.
- 17.7 In the absence of any condition the UNISA policy will apply.

## **18. COLLEGE RESEARCH FUNDS**

These are University funds, therefore rules as per the University policy and procedures will apply.

## **19. GENERAL TAX IMPLICATIONS ON RESEARCH INCENTIVE FUNDS AND NRF GRANTS**

- 19.1 The total amount payable will be disclosed on the individual's IRP5.
- 19.2 Claims for actual kilometres travelled will be paid as per the applicable SARS rate for the use of an own vehicle.
- 19.3 Accommodation and subsistence allowances for both domestic and international travel will be paid in line with the rates published in the *Government Gazette*, the Policy on Travel and Accommodation and Related Expenses, and in accordance with applicable tax laws and directives.

## **20. SPONSORED PROJECTS**

The University's Travel and Accommodation Policy and standard operating procedures apply to all travel and accommodation relating to sponsored projects, unless arrangements are made and paid for directly by the sponsor.

## **21. TRAVEL AND ACCOMMODATION – PARTNERS/PERSONS ACCOMPANYING A MEMBER OF THE MANAGEMENT COMMITTEE/COUNCIL**

- 21.1 Should it be deemed, in the interest of the University, for a category 1 official to be

accompanied by a partner, the travel and accommodation costs of the partner will be paid for by the University in accordance with paragraph 30.3. Such costs will be taxed as a fringe benefit in the hands of the UNISA official. UNISA's Section: Travel and Accommodation Management must submit the taxable amount to the Directorate: Salary Administration.

- 21.2 In all cases, prior approval must be obtained in writing from the Principal and Vice Chancellor, who must inform the Chairperson of Council. This approval must be attached to the travel request.
- 21.3 In the case of the Principal and Vice Chancellor, another member of the Management Committee may sign the travel request and ensure that the Chairperson of Council is informed through the Office of the Registrar.
- 21.4 The following will be taken into account in considering requests for accompanying partners:
- (a) The frequency of absence from home on approved business travel during the preceding 12 months;
  - (b) The period of absence during the trip under consideration; and
  - (c) The special needs of the UNISA official (e.g. in cases of disability)

## **22. CANCELLATION OF RESERVATION**

- 22.1 If a reservation is cancelled, the official will be held responsible for any cancellation fees, except where cancellation is at the request of the University or in the event of illness or any other extraordinary personal circumstances, as approved by the relevant line manager.
- 22.2 It is the responsibility of the official to inform UNISA's Section: Travel and Accommodation Management once approval by the relevant line manager has been obtained for the cancellation.
- 22.3 Should the traveller cancel the trip after the subsistence allowance has been paid by the University, the traveller must notify UNISA's Section: Travel and Accommodation Management to arrange or facilitate the process of re-imbursing the University.

## **23. UPGRADE AND CHANGES TO TRAVEL ARRANGEMENTS**

Upgrading of flight tickets or changes to travel arrangements are allowed only once that result in a price increase will be paid by the University, provided that, upon his/her return the UNISA official provides a valid reason therefor and has it approved by the relevant line manager. If not approved, it will be for the UNISA official's own account. However, upgrade or changes prior to travel are allowed, provided there is a valid reason.

## **24. TRAVEL AND ACCOMMODATION BETWEEN MEETINGS**

In the event where the UNISA official has to attend two different meetings or conferences on two different dates and at two different venues, the official may stay overnight in either of the venues without having to return, provided the official has produced signed-off approval to attend those two events. All applicable allowances and accommodation rates will be paid by the University for the days in between while the official waits for the next meeting or conference.

## **25. VENUE BOOKINGS FOR CONFERENCES**

Venue bookings must be done in accordance with the Policy on Supply Chain Management and in line with the hotel ratings as outlined in this policy.

## **C. RULES – DOMESTIC TRAVEL AND ACCOMMODATION**

### **26. AIR TICKET**

- 26.1 All officials, except the Chairperson of Council, will travel economy class when travelling domestically.
- 26.2 All flight bookings for domestic travel will be booked at low-cost carriers, unless there is no route for that specific airline, with the exception of category 1 and 2 officials, who can be booked on any other carriers.

### **27. ACCOMMODATION**

- 27.1 Accommodation will be booked only if a UNISA official travels more than 100 km away from his or her place of work.
- 27.2 As an exception to the rule in paragraph 24, officials who attend official University events after hours and where such events are likely to end after 19:00, may book accommodation on such occasions, provided the official has to travel **more than 100 km back home**.
- 27.3 The accommodation rates will be capped as per standard operating procedure (Annexure D)
- 27.4 The hotel rate cap applies to the different categories of officials and will be reviewed annually.

### **28. CAPPED/LIMIT RATE NOT AVAILABLE**

- 28.1 If the capped/limit ratings (as per Annexure D) are not available in a particular area or if adhering to the limit will result in unreasonable inconvenience to the official (e.g. excessive travel or risk), an alternative booking may be made at a hotel with a rate higher than that indicated in Annexure D. In this case, officials are required submit a motivation approved by the line manager.

- 28.2 Guest houses

If the preferred accommodation is not a hotel but a guesthouse (B&B), the rates should be in line with the capped rates listed in Annexure D.

### **29. TRANSPORT TO AIRPORT FOR DOMESTIC TRAVEL**

- 29.1 Car rental from place of work/home to the airport will not be booked by the University.
- 29.2 Car rental will be booked from place of arrival (airport) to the hotel/guest house and bookings must be done through UNISA's Section: Travel and Accommodation Management.

Travel cost from work/home within a 100 km radius of the airport will be paid through the payroll and limited to the amount indicated in Annexure C to cover the cost of transport, parking fees and tollgate fees to and from the airport. Officials travelling from work/home beyond the 100 km radius will be paid per kilometre as per the SARS rate.

Should officials prefer to book a shuttle service, such a booking must be done through UNISA's Section: Travel and Accommodation Management.

## **D. RULES - INTERNATIONAL TRAVEL AND ACCOMMODATION**

### **30. AIR TICKET AND ACCOMMODATION**

30.1 The following categories apply:

<b>Category</b>	<b>Flight class</b>	<b>Hotel rating</b>
Category 1	Business class (travel exceeding four hours one way) with the exception of the Chairperson of Council who travels in business class irrespective of the distance	5-star hotel
Category 2	Business class (travel exceeding four hours one way)	4-star hotel
Category 3	Economy class	3-star hotel

30.2 All categories of officials must travel in economy class for domestic travel, except the Chairperson of Council. For distances exceeding four hours one way, category 1 and 2 officials may be booked into business class.

30.3 Where applicable, a UNISA official (categories 1 and 2) may be allowed to downgrade from business to economy class to accommodate an accompanying person. (The total cost may not exceed the cost of a business class ticket.) The cost of the accompanying person will be taxed as a fringe benefit in the hands of the UNISA official. UNISA's Section: Travel and Accommodation Management must submit the taxable amount to the payroll section.

30.4 For all international accommodation UNISA officials are advised to check with UNISA's Section: Travel and Accommodation Management for a list of preferred hotels.

30.5 If a star rating is not available, refer to paragraph 28.1 above.

30.6 Senior Management (categories 1 and 2) are not allowed to travel on the same flight during an international trip, irrespective of whether they are travelling to the same destination.

### **31. SUBSISTENCE ALLOWANCE**

31.1 A subsistence allowance, as per Annexure B, will be paid to cover the cost of meals and other incidental expenses when the UNISA official spends at least one night away from home on business.

31.2 The rates relating to the subsistence and travel allowance for international travel will be amended from time to time.

31.3 International subsistence allowance will be paid as per Annexure B (allowance to airport) while in South Africa, and one day plus 50% of foreign daily allowance (1.5 days) after the dates of the official business period (e.g. dates of the conference or workshop). This amount must also be used for all transport-related expenses (transport from home to the airport and back, and intra-city transport such as buses, taxis and metro rail). City-to-city transport will be paid by UNISA.

31.4 Subsistence allowance for travel to the common monetary area (Namibia, Lesotho and Swaziland) will be paid as per the domestic rate stipulated in Annexure A.

31.5 The University is not responsible for fluctuations in exchange rates.

31.6 Where own accommodation arrangements are made, the amount paid will be limited to the rate as indicated in Annexure B, option 1.1. This amount will be subject to PAYE.

31.7 Any additional allowable expenditure will require an original proof of expenditure.

## **32. TRANSPORT TO AIRPORT FOR INTERNATIONAL TRAVEL**

- 32.1 For international travel, no transport cost to the airport will be paid since this is included in the subsistence allowance.
- 32.2 UNISA's Section: Travel and Accommodation Management will not make any transport arrangements to and from the airport.

## **33. INSURANCE**

Medical and life insurance for the duration of the official travel will be arranged by UNISA's Section: Travel and Accommodation Management where the mentioned section is responsible for the booking. Insurance costs for a private stay will be for the official's own account.

## **34. VISAS AND INNOCULATION**

The UNISA official must apply for his/her own visa and inoculation and must apply for reimbursement of the cost thereof on i-travel from UNISA's Section: Travel and Accommodation Management, to be paid by UNISA's Finance Department (Creditors Section). Receipts must be attached as well as supporting documents.

## **35. EXITING THE UNIVERSITY<sup>2</sup>**

An employee who resigns from the employ of the University within two months of undertaking international travel, is required to reimburse the University for expenses incurred as a result of the travel.

# **E. RULES – ROAD TRAVEL**

All travel between home and the regular place of work is for the UNISA official's account.

## **36. CAR TRAVEL**

- 36.1 UNISA officials (except for category 1 and 2 officials) must make use of UNISA pool cars or their own vehicle for local travel when a pool car is not available.
- 36.2 Application for a pool vehicle must be made, through the Logistics Section, on the prescribed form, at least seven working days before the car is required.
- 36.3 All travel claims for the use of an own or a rented vehicle (except for category 1 and 2 officials) must be accompanied by confirmation from the Logistics Section that a UNISA pool car was not available or viable on the date and at the time of travel.
- 36.4 Where the UNISA official's own vehicle was used, the distance travelled is calculated from the usual workplace to the destination and back. The mileage should be claimed on the i-travel system. Note that travel to and from airports is excluded. For all travel between campuses, officials must use the available shuttle service. Meetings on campuses must be scheduled with due regard for shuttle times. If not practical, the official must obtain prior approval from the line manager to use his/her own vehicle. Category 3 UNISA officials will be re-imbursed according to SARS-approved rates, as stipulated in Annexure C. Only one UNISA official will be re-imbursed in the event where several UNISA officials travel together in private transport.
- 36.5 The responsibility centre manager should ensure that, where possible, travel arrangements are coordinated to save on travel costs.
- 36.6 Category 1 and 2 officials must use their own vehicles for local travel and claim a reimbursement on the i-travel system.

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<sup>2</sup> Resolution of Man Com – 21.08.2012

36.7 In exceptional cases where a pool vehicle is not available and UNISA officials do not have their own vehicle, requests for rented vehicles for local travel (excluding travel to the airport) may be made through UNISA's Section: Travel and Accommodation Management. The request must be signed by the line manager accountable for the responsibility centre. Reasons for the exception, destinations, dates and departure points must be clearly indicated on the requisition (invitations to/the agendas of meetings to be attended must be attached).

### 37. CAR RENTAL

37.1 When travelling by air, UNISA's Section: Travel and Accommodation Management will secure car rental services at the destination. If two or more officials are travelling to the same destination, only one car may be booked.

37.2 Where UNISA officials other than persons with disabilities do not have a driver's licence or are not able to drive due to physical or other forms of temporary impairment, requests for a shuttle service for local travel may be made through UNISA's Section: Travel and Accommodation Management. The request must be signed by the line manager accountable for the responsibility centre. Reasons for the exception or special needs, destinations, dates and departure points must be clearly indicated on the requisition (invitations to/the agendas of meetings to be attended must be attached).

37.3 UNISA officials making use of car rental services must ensure that:

- a) they are in possession of a car voucher before leaving.
- b) the car voucher is presented to the car rental company to validate receipt of the vehicle.
- c) they carefully check the condition of the vehicle upon collection and return in the presence of the car rental representative.

37.4 Any claims for damages from the car rental company, where the driver is found to be negligent, will be recovered from the UNISA official.

37.5 Extensions and changes can only be made by way of submitting an approved motivation by the relevant line manager accountable for the responsibility centre. **Any unauthorised extension of car rental will be recovered from the UNISA official.**

37.6 No car rental will be booked for a distance equal to or within less than a 100 kilometre radius from the University.

The following categories will apply:

Car group	Official categories
Group H or equivalent	Category 1
Group C or equivalent	Category 2
Group B or equivalent	Category 3
Group E or equivalent	Officials travelling in groups of three or more

In the event where, the categories mentioned above are not suitable for the purpose of the travel, other means of transport can be used provided the line manager and Executive Director's/Dean's approval is obtained.

### 38. OTHER COSTS

38.1 Tollgate costs (excluding travel to and from airports) relating to official trips will be reimbursed upon return (against proof of payment).

38.2 Traffic fines and related administration costs will not be paid by UNISA but will be for the driver's account.

38.3 The cost of parking at the hotels will be included in the accommodation voucher.

### **39. CANCELLATION OF CAR RENTALS**

39.1 All cancellations of car rentals must be made at least twelve hours prior to the stipulated delivery date and time unless some unforeseen emergency occurs.

39.2 All cancellations, including the full reason for such cancellations, must be authorised by the line manager who originally authorised the booking.

## **F. RULES – GENERAL**

### **40. PROOF OF TRAVEL**

40.1 UNISA officials who undertook an official business trip must produce documentary proof of travel as evidence that the trip indeed took place.

40.2 The traveller must submit the documentary proof or evidence to UNISA's Section: Travel and Accommodation within seven working days of his or her return. Failure to do so will result in the trip being deemed never to have occurred. In this event, paragraph 22 – Cancellation of reservations shall apply.

40.3 The traveller shall be liable to refund all costs the University incurred in regard to that particular booking.

### **41. BOOKINGS**

41.1 All international travel arrangements must be made at least twenty-one working days prior to departure.

41.2 Arrangements for domestic trips must be made at least ten working days in advance, to allow for the electronic payment of a subsistence allowance prior to departure.

41.3 When using the online travel booking system, the traveller needs to consider all available flights which could be scheduled one hour before or one hour after the envisaged departure time. Failure to comply with this time interval may result in missed savings which could be reported as non-compliance, unless a valid reason is provided.

### **42. VOYAGER MILES/LOYALTY PROGRAMME**

UNISA travel officials are not allowed to use their personal voyager miles or loyalty points while travelling for business reasons, provided it does not cost UNISA more money.

### **43. IMPLEMENTATION OF POLICY**

The Policy on Travel and Accommodation and Related Expenses is replaced with effect from the date on which Council approves this Policy.

