



TRAVEL POLICY

**GENERIC CONDITIONS FOR APPROVED TRAVEL
ASSOCIATED WITH AIOH BUSINESS OR
PROFESSIONAL ACTIVITES**

ABN: 50 423 289 752

Policy number: POL_AIOH0_V2_TravelPolicy

Approved by Council: 16.07.2020

Scheduled review date: 16.07.2024

1.0 OVERVIEW

1.1 This policy details how AIOH employees and nominated members representing the AIOH (the Traveller), who undertake both domestic or international travel shall conduct themselves to ensure that any travel and representation by the Traveller, of the AIOH;

- a. is undertaken in a professional manner,
- b. is undertaken in relation to AIOH business, or provides professional benefits to the AIOH and its members;
- c. is transparent and maintains the integrity of the AIOH; and
- d. is authorised and approved by AIOH Council.

1.2 Approved Travel is designed for the main purpose of undertaking and or promoting AIOH associated activities by AIOH members and AIOH employees. AIOH Council recognises the considerable voluntary efforts put in by some members such as those on the Executive, Council and Committees. As such, limited additions to Approved Travel can be made. For example;

- for the purpose of promoting the business of the member's employer,
- for activities involved in commercial gain,
- for a brief period of travel with family or friends (refer Note1).

Any additional activities, such as those described above, must be;

- fully paid for by the Traveller,
- limited in nature with full detailed disclosure to Council of the contacts, duration and activities associated with the additional activities,
- do not detract from the realisation of AIOH objectives, or its reputation, and
- approved by Council prior to travel.

1.3 Additional conditions of Travel associated with sponsored AIOH Professional Development Awards is covered by a separate policy; '*Generic Conditions for Overseas and Domestic Travel Associated with AIOH Awards*'.

2.0 CONDITIONS OF TRAVEL

2.1 The AIOH and our Insurer shall not be liable for any costs incurred where a journey is undertaken against a doctor's advice, or for the purpose of seeking medical treatment overseas, or if the insured person is 'not fit to travel'.

2.2 All domestic or overseas air, rail and ground travel provided is to be at the most cost effective economy class. Ticketing is to be made with considerations to efficiency, economy and safety, and is to be undertaken at a reasonable but not at an excessive standard preferably at advanced purchase rates. Travellers may upgrade to a higher class of travel at their own expense.

2.3 Domestic or overseas travel costs supported by the AIOH are to include incidentals such as transport to and from;

- a. airports;
- b. accommodation; and
- c. the location of the AIOH business meeting or AIOH activity.

2.4 Travel as indicated in Clause 2.2 shall be approved by AIOH Council prior to travel. (i.e. taxi v's car hire, for private car usage mileage allowance at ATO rates v's flat charge).

2.5 Travel to each location shall be undertaken in a manner so that the Traveller is fit and ready to commence the AIOH business meeting or AIOH activity at the start of each business day or later on the day of arrival as applicable (i.e. taking into account matters of personal safety relevant to some locations, complete work on one day, travel that afternoon or evening ready to start the next visit the following morning; if a weekend is in between visits, then travel is to be taken on the weekend so as to be at the location ready to start the next site visit at commencement of the business day) (refer Note 1).

2.6 The basis of the reimbursement of cost of approved accommodation, meals and incidentals associated with the AIOH business meeting and/or representation is to be at the lower of the daily rate listed by the Australian Tax Office or the non-Senior Executive Service rate determined for Australian Government employees specific to the location(s) of the AIOH business or an equivalent amount agreed by Council. Any additional costs associated with meals and incidents shall be the responsibility of the Traveller (refer Note 1). Note that alcohol, minibar, clothes laundry, in-house movies, personal services and such related costs are not approved costs for reimbursement. Where internet access is not provided in accommodation costs, then the AIOH will only reimburse associated costs for AIOH related business and the Traveller will be required to supply evidence of such.

2.7 The AIOH will only reimburse telephone call charges associated with AIOH related business. The Traveller will be required to supply evidence of such.

3.0 ADDITIONAL CONDITIONS SPECIFIC TO OVERSEAS TRAVEL

3.1 The costs of accommodation as indicated in Clause 2.5 shall be provided for the duration of the period that AIOH business or representation is undertaken, and may include one (1) rest day on arrival and where necessary one (1) rest day immediately prior to return (refer Note 1).

3.2 Should there be approved scheduled or unavoidable delays in travel, then AIOH will cover such costs including any FBT liability if it arises and if later approved by AIOH Council.

3.3 The standard of accommodation shall be reasonable but not at an excessive standard and take into consideration the efficiency and safety of the Traveller.

3.4 Accommodation, travel and incidentals taken outside the period of official representation shall be at the cost to the Traveller (refer Note 1).

4.0 TRAVEL INSURANCE

4.1 AIOH provides corporate travel insurance for all AIOH members who are travelling for, or on behalf of the AIOH, as delegated and authorised by the AIOH. Accompanying persons are not covered by the AIOH Corporate Travel Policy and are responsible for their own travel insurance arrangements.

4.2 The AIOH makes no comment or recommendation as to the suitability of the corporate travel insurance policy¹.

4.3 Utilising or intending to use the AIOH's corporate travel insurance policy, will be taken by the AIOH as a consent by the authorised Traveller to comply with the terms and conditions of the corporate travel insurance policy including any or all limitations or exclusions.

4.4 A copy of the Certificate of Currency and related policy documents is available from AIOH Administration.

4.5 Overseas Travel includes the mandatory provision by AIOH of Travel Insurance, particularly coverage for a medical emergency.

4.6 The AIOH corporate travel insurance policy contains exclusions and limitations. For a comprehensive list of all

¹ . The AIOH Corporate Travel Insurance Policy is provided on a non-advice, generalized basis. As such it is an individual's requirement to read the applicable terms and conditions of the cover and ensure it meets their specific requirements. Moreover, the authorized Traveller acknowledges and understands that the AIOH is not an Australian Financial Services Licensed entity. As such the AIOH are not in a position to specifically address queries on the travel policy's terms and conditions. Any specific questions should be forwarded to the broker currently AFSL Broking entity Team Care Pty Ltd for appropriate review and response.

exclusions and limitations please refer to the current policy. Some but not all of the exclusions and limitations are set out below:

- a. Trips exceeding 180 days are not covered;
- b. Costs of Medication – If you have a condition and know you require medications then purchase of these medications overseas is not covered e.g. an asthmatic purchasing 'Ventolin';
- c. Costs of Known Medical Consultations – if you have an existing condition and know you must visit a physician whilst overseas;
- d. Travelling against medical advice;
- e. Age Limitations – For certain sections of cover if the Traveller is over 85 years of age, then cover is subject to limitations; or if relatives (over 100 y/o) pass away requiring the Traveller to cancel their trip and return home or the like, then cover is subject to limitations;
- f. Pre-Existing Conditions – are covered for issues such as medical expenses & repatriation costs, though there are some limitations in certain sections of cover for pre-existing conditions;
- g. Travelling against travel warning advices such as a Pandemic;
- h. Travelling to war torn countries or areas with imposed travel warnings for civil unrest;
- i. Travelling to countries with specific sanctions & limitations in place;
- j. Travelling for Medical / Surgery Procedures – No cover is available when a person travels for the purpose of obtaining medical advices or having a medical procedure; and
- k. Non- Scheduled Flights – for example helicopter charters and the like must be declared if you anticipate doing more than 3 per annum.

4.78 Where a member is required to travel on AIOH business and they have a pre-existing medical condition, they must obtain a letter from their General Practitioner that outlines that they are 'fit for travel'. This helps to alleviate any disputes arising at claim time if an issue arises unexpectedly out of a pre-existing condition. It also lessens the chance of a claim being declined due to person not being fit for travel.

4.89 AIOH Corporate travel insurance is not payable if the insured person has not complied at all times with local safety advice and adhered to recommendations prevalent at the time, or has remained in country after a travel warning which recommends that travellers should leave the area and such a warning or recommendation has been ignored.

4.9 The AIOH will not be liable for any costs, expenses, compensation, bodily injury, property damage or consequential losses arising out of this corporate travel insurance program (indemnified or otherwise via the contract of insurance). The authorised person acknowledges it hereby releases & holds harmless the AIOH from and against all claims in relation to this matter.

4.10 The AIOH will not be liable for any costs, expenses, compensation, bodily injury, property damage or consequential losses arising out failure of the Traveller to abide by the AIOH Alcohol and Illegal Drugs Policy.

5.0 INCIDENTAL OR NON-AIOH TRAVEL

5.1 The details and extent of incidental or non-AIOH overseas and/or domestic travel whilst travelling for AIOH business and/or representation, is at the discretion and approval of the AIOH Council. The nature along with full detailed disclosure of the contacts, duration and activities associated with the additional activities, is to be approved by Council prior to travel, and are not to detract from the realisation of AIOH objectives, or its reputation.

5.2 Non-AIOH travel is not to interfere with the ongoing AIOH business undertaken during the travel, or interfere with the smooth running of ongoing AIOH Council activities.

5.3 Any incidental travel shall not incur more than seven (7) additional days absence from Australia unless approved otherwise by Council.

5.4 The costs associated with incidental/ non-AIOH overseas and or domestic travel is the financial and legal responsibility of the Traveller (refer Note 1).

6.0 ACCOMPANYING PERSONS

6.1 The extent of involvement of any Accompanying Persons during overseas or domestic travel, is at the discretion and approval of the AIOH Council.

6.2 As outlined in Section 4.1, the AIOH travel insurance policy does not provide cover for accompanying persons.

6.3 All costs and liabilities associated with Accompanying Persons overseas are the financial and legal responsibility of the Traveller.

7.0 APPROVAL OF ITINERARY

7.1 Travellers are required to prepare and send to AIOH Administration a detailed travel and business itinerary and an itemised estimate of associated travel costs taking into account conditions contained in this policy, unless such Council approved travel is arranged by AIOH Administration.

7.2 An itinerary containing the details listed in Clause 6.1 must be approved by AIOH Council prior to making formal travel arrangements. Once approved, travel will be booked by the AIOH Office or Traveller, as required.

7.3 Where an itinerary and costing has been approved and it becomes known by the Traveller prior to travel that these may change and in particular to increase the costs, AIOH Administration must be advised in writing as soon as possible as travel approval may be cancelled. The Traveller is to advise the circumstances relating to the change in situation, and resubmit the changes in travel and or costing for approval by the AIOH Council.

7.4 Where such circumstances change during travel, then the AIOH Council is to be advised as soon as possible either by email or telephone to discuss the changes. Depending on the circumstances, the Traveller may be required to pay all increased costs or else contribute towards the increased costs.

8.0 EXPENDITURE DOCUMENTATION AND TRAVEL REPORT

8.1 After approval of the itinerary and costs by Council, large cost items such as airfares, accommodation and conference fees may be requested to be paid;

- a) in advance by the AIOH Office,
- b) may be arranged by the Traveller and the AIOH Office then reimburses the Traveller or the travel agent prior to travel or,
- c) the Traveller may decide to defer reimbursement of large item costs until after the travel and include such item/s in the reimbursement process as per 8.4.

8.2 Within six (6) weeks of return, the Traveller shall provide a report on the outcome of the meeting or activity in an approved AIOH format for AIOH Council, and for inclusion in the official AIOH records.

8.3 The AIOH Council may request the Traveller provide a short report suitable for inclusion in the AIOH Newsletter within the above timeframe.

8.4 On return, the Traveller shall furnish the AIOH with documented travel expenditure including tax invoices, which they require to be reimbursed using the AIOH Claim Form. Expenditure on travel documentation such as receipts and invoices should be matched to entries in the claim form and any discrepancies explained. Council will determine on the basis of fairness to both to the Traveller and the AIOH members if the discrepancies are to be allowed. For example, where the Traveller is unable to obtain a tax invoice.

8.4 Requests for reimbursements shall be made promptly. Unless specifically approved by Council (e.g. due to illness) claims for travel reimbursement may not be accepted if submitted greater than 3 months after the travel is completed.

8.5 Travel claims shall not be paid by the AIOH, until the Traveller has provided a report as per Clause 8.2.

[Note 1. Such additional travel may invoke Fringe Benefits Tax which will be the responsibility of the Traveller; refer to the ATO website or seek professional advice e.g. from your Accountant.]

9.0 REFERENCED POLICIES AND PROCEDURES

AIOH Rules and Statement of Purpose

AIOH 04 Code of Ethics Policy

AIOH 03 Conflict of Interest Policy

AIOH 10 Sub Committee Ad-hoc Committee and Working Party Policy

AIOH Generic Conditions for Overseas and Domestic Travel Associated with AIOH Awards.

10.0 AUTHORISATION

Signature of Council Secretary:

Name of Council Secretary: Sharann Johnson

Date of Council approval: 16.07.2020