Prior to submitting a travel request: travellers <u>must</u> review the <u>six steps to travel</u> and <u>comply</u> with the <u>UQ Travel Policy</u> and <u>Dual Purpose Travel (DPT) Procedure</u>.

Google Chrome is the recommended browser for UniTask

NOTE: You can save data entered into a form and return later by clicking *Save data and return later* at the bottom of the form.
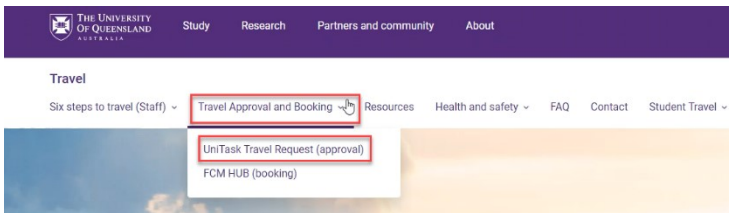

⚠️ You can only fill out one form at a time. The saved form will not display in your My Requests dashboard until the form is submitted (See Accessing UniTask Travel Request section for accessing a *saved* travel request).

1. Accessing UniTask Travel Request

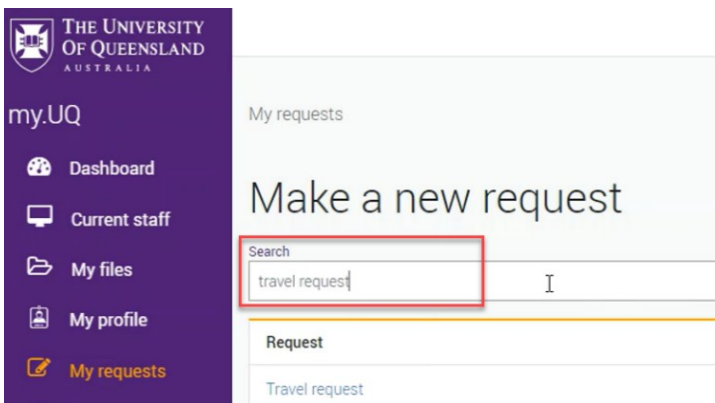➤ From the <u>UQ Travel website</u> (travel.uq.edu.au) select *Travel Approval and Booking / UniTask Travel Request (approval)*

➤ Select New request
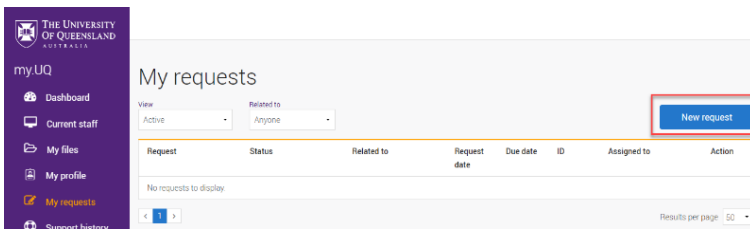
➤ Search and select Travel request

➤ If you do not have a saved travel request, continue to step **2. Request details**.

➤ To **complete** a *saved* travel request, select *Load saved data*

⚠️ You cannot submit a new travel request and retain saved data, if you select Start new form, the previously saved data will be lost.

2. Request details

➤ Select the relevant options

3. Approval

➤ Search for your relevant travel approver by name. **Refer to your local area for guidance if you are unsure**.

4. Traveller details

➤ If *Are you the person travelling?* = NO (see Request details section)
➤ Select traveller type: *UQ Staff / Non UQ person*

➤ If traveller is UQ staff, select *Search User*

➤ Search for UQ staff member (not all fields required)
➤ Select traveller

User name	First name	Last name	Email	Job title	Default org unit	
	jodi	walton				Search

User name	First name	Last name	Email	Job title	Default org unit	
uqjwalt3	Jodi	Walton	staging.unitask@uq.edu.au	University Travel Risk Manager	Enterprise Risk Services	Select

➔ School/Institute/Business Unit will auto-populate if staff hold only one position.

Select an option

Enterprise Risk Services (University Travel Risk Ma...

> If traveller holds **multiple positions**, select the position associated with the travel from the drop down

➔ If traveller is a non UQ person, complete the traveller's details

Traveller first name: (required)

Traveller last name: (required)

5. Trip details

➔ Select *Primary reason for travel* (meaning the main reason) from the drop down. Only one (1) primary reason can be selected.

Primary reason for travel: (required)

Select an option
- Academic collaboration
- Adding location to approved trip
- Attend meeting/event
- Attend conference/seminar
- Fieldwork/trip
- Professional development
- Research
- Site visit/inspection
- Teaching
- University duties

Will field work be undertaken during the travel? (required)

PRIMARY travel destination (country): (required)

Selected PRIMARY travel destination (country): (required)

➔ If Adding a location to approved trip is selected, Existing UniTask Trip ID must be entered in the field provided

Primary reason for travel: (required)   Adding location to approved trip

Existing Trip ID: (required)

> Adding a location to approved trip, should only be used when a trip has already been **approved** and traveller is now adding a new (additional) destination/s.

➔ If *Will off-campus or field work be undertaken during the travel?* = YES
➔ *UQ Safe Work Off-Campus and Fieldwork Plan ID* must be entered

Will off-campus or field work be undertaken during the travel? (required)   ○ Yes   ○ No

UQSafe Work Off-Campus and Fieldwork Plan ID: (required)

➔ *Primary travel destination* (meaning the main **country**), search by entering the name of the country and select from the drop down

PRIMARY travel destination (country): (required)   United Kingdom

Selected PRIMARY travel destination (country): (required)   United Kingdom

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➔ Complete the following, noting all UQ business activities

Provide a summary of trip : (required)

Explain how the requested travel aligns to UQ objectives and strategic priorities and why the requested travel is the only viable way to achieve the business/academic objective: (required)

➔ Select *Trip type*

○ Return
○ One-way
○ Multi-city

> **Return:** single business destination e.g. Brisbane-London-Brisbane
> **One-way:** to/from one business destination e.g. London-Brisbane
> **Multi-city:** multiple business destinations e.g. Brisbane–London–Paris–Brisbane

➔ *Departure/Arrival* destinations, start typing the relevant Departure/Arrival location name (city/town) and select from drop down option/s.

Departure (city/town) (required)   Arrival (city/town) (required)
Brisbane City, Queensland, Australia   London, England, United Kingdom

➔ Search DFAT Smartraveller website for travel advice level of all **arrival** destinations, including transits by searching the country name.
➔ You must select the travel advice level relevant to the city/town you are planning to travel to unless the overall country travel advice level is higher.
➔ Ensure you Select the correct travel advice level

> ⚠ **Additional high risk approval** required for travel advice levels *Do not travel*, *Reconsider your need to travel* and *No advice issued.*

Arrival location DFAT Smartraveller travel advice level (required)

Select an option
- Do not travel
- Reconsider your need to travel
- Exercise high degree of caution
- Exercise normal safety precautions
- No advice issued
- N/A - Australia

> **N/A – Australia** is to be used when Australia is the *Arrival (city/town)*

Departure (city/town) (required)	Arrival (city/town) (required)	Arrival location DFAT Smartraveller travel advice level (required)
Brisbane City, Queensland, Australia	London, England, United Kingdom	Exercise normal safety precautions
London, England, United Kingdom	Brisbane City, Queensland, Australia	N/A - Australia

➔ Complete date fields, this is the departure date from the departure (city/town), total number of nights will calculate

Departure (city/town) (required)	Arrival (city/town) (required)	Arrival location DFAT Smartraveller travel advice	Date (required)
Brisbane City, Queensland, Australia	London, England, United Kingdom	Exercise normal safety precautions	08/10/2022
London, England, United Kingdom	Brisbane City, Queensland, Australia	N/A - Australia	15/10/2022

Total number of nights away: 7

Exception: date of final leg is date of arrival into _final destination,_ in the example above 15/10/2022 is arrival into Brisbane

→ If Traveller type = UQ staff
→ Select Yes/No if trip includes private days

Does your trip include any private days _during_ the UQ business trip? (required)
○ Yes
◉ No

→ If Yes, private days included, enter the number of private nights

Does your trip include any private days _during_ the UQ business trip? (required)
◉ Yes
○ No

Total number of private nights away: (required) [ ]

6. Dual purpose travel

Dual purpose travel (private days during the UQ business trip) may be allowed if the private days are:
- only in the **business location** (city/town) where the traveller is **currently** undertaking business; AND
- **total private days must be less than total business days** for the entire UQ travel journey.

Do not include details of private holidays prior to, or after, a UQ business trip.

→ Complete dual purpose travel diary as a record of business and private travel activity/s undertaken (includes travel days to/from destinations)
→ Select _Activity_ from drop down for each Location and date range (all dates must be accounted for)

Activity (required) — Select an option

Academic collaboration
Attend conference/seminar
Attend meeting/event
Business weekend (conducting business on both preceding Friday and following Monday, neither can be solely travel days)
Fieldwork/trip
Professional development
Public holiday recognised in business location (preceding day and following day are business days)
Recovery day (following day is a business day)
Research
Site visit/inspection
Teaching
Travel from business location to business location
Travel from normal place of work to business location
Travel from business location to normal place of work
Unavoidable overnight stopover
University duties
Private day
Personal weekend

Activity (required)	Location (required)	Start Date (required)	End Date (required)
Travel from normal place of work to	Brisbane City, Queensland, Australia	08/10/2023	09/10/2023
Attend conference/seminar	London, England, United Kingdom	10/10/2023	13/10/2023
Private day	London, England, United Kingdom	14/10/2023	18/10/2023
Travel from business location to no	London, England, United Kingdom	19/10/2023	20/10/2023

→ Form will not Submit if each Location is not allocated an activity (including departure and arrival location, in example above Brisbane)
→ For more detailed Dual purpose examples refer to _Dual Purpose Travel Quick Reference Guides_

⚠️ Travel to or from a **business location** to **private location** is not permitted. Do not include in the UniTask travel request. Solely private locations are not permitted.

7. Travel Diary

If travel has _no private days_, a travel diary will be required for:
• Multi-city trips (regardless of nights away)
• One-way trips/return trips (6 nights and over)
If private days are included, the Dual purpose travel section replaces the Travel diary

→ Complete travel diary as a record of travel activity/s undertaken (includes travel days to/from destinations)
→ Select _Activity_ from drop down for each Location and date range (all dates must be accounted for)
→ Form will not Submit if each Location is not allocated an activity (including departure and arrival location, in example below Brisbane)

Activity (required)	Location (required)	Start Date (required)	End Date (required)
Travel from normal place of work to	Brisbane City, Queensland, Australia	08/10/2023	09/10/2023
Attend conference/seminar	London, England, United Kingdom	10/10/2023	13/10/2023
Travel from business location to no	London, England, United Kingdom	14/10/2023	18/10/2023

8. High risk destination

High risk travel will not be approved without evidence of careful planning and justification

→ Complete the following sections in detail

Is the travel essential and why can't the business objective be achieved via other means or in another destination? Detail benefits travel will provide to UQ or opportunity cost if travel is not undertaken.

What are the main risks associated with the travel? Detail how the risks will be managed and/or mitigated. Consider personal health and safety risk as well as reputational/strategic risks to UQ.

What passport will you travel on? Detail and additional information regarding visas, entry/exit requirements for all destination/s.

→ Attach any supporting documentation that helps justify the trip

9. Budget
→ Select _Expense Type/s_ from the drop down

Expense Type (required) — Select an option

Airfare (Economy)
Airfare (Premium Economy)
Airfare (Business Class)
Accommodation
Meals
Incidentals
Transport
Other

If _Airfare Premium Economy_ or _Business Class_ is selected, additional justification is required as per UQ Travel Policy Clause (22).

→ Enter the estimated expense amount/s in AUD

Expense Type (required)	$ amount (required)
Airfare (Economy)	1500
Accommodation	1700

Add another expense type

Travel allowance can be entered in as '*other*' expense type, write travel allowance and enter AUD amount. To be paid a Travel allowance, you must submit a Travel allowance expense claim in ExpenseMe Pro.

Expense Type (required)	Other (required)	$ amount (required)
Other ▼	Travel allowance	500

➢ Select how the travel will be funded from drop down

How will travel be funded (required)

Select an option ▼
UQ funded
Externally funded
Both UQ and externally funded

If relevant, outline any other financial implications of the travel:

➢ If *UQ funded*, provide Chart String/s and $ allocation/s

Chart String (required)	$ allocation (required)
8431109-01-126-41	3200

Add additional chart string

Total UQ costing
Total UQ costing must equal total Estimated expenses ➡ 3200

Contact your Finance Advisory team for Chart String information

➢ If *Externally funded* (including personally funded) complete and provide $ allocation/s in AUD

Is there any personal contribution? (required)
○ Yes ● | $ amount (required) 500
○ No

Is there any external contribution? (required)
● Yes | Provide chart string information if UQ are seeking reimbursement from the external organisation
○ No

Chart String (if applicable)	$ amount (required)
8431109-01-126-41	1000

Name of external organisation: (required) | ABC Research Institute

Total external contribution:
Total external contribution must equal total Estimated expenses | 1500

➢ If *Both UQ and externally funded* complete above 2 steps

➢ Select if booking with FCM Travel Solutions, if Yes, select to send approved Travel Request to FCM

Will the travel booking be made with FCM Travel Solutions? (required)
● Yes
○ No

Send approved Travel Request to FCM? (required)
○ Yes
○ No

Justification required for booking outside of FCM

Send **approved** *Travel Request to FCM* is a notification only, FCM take no action until contacted by traveller/booker to obtain a quote/ booking.
If No is selected, the requester can send the Travel Request to FCM later via UniTask.
Note: Simple point to point international travel can be booked via the online booking platform SAVI.

10. Supporting documents

➢ Attach documents to support your travel request

Requirements may vary across local areas

11. Traveller declaration and Submit

⚠ | Declaration will only appear if requester is the traveller

Requester is traveller

➢ Read and confirm declaration, *Submit*
➢ Travel request notification email sent to traveller and supervisor (NO action required by supervisor)
➢ Travel request approval required email sent to **Travel Approver**
➢ Request will appear in traveller's my.UQ dashboard - My requests

Requester on behalf of UQ staff

➢ Requester *Submit*
➢ Travel request notification email sent to requester and traveller's supervisor (NO action required by supervisor)
➢ Traveller receives request to read and confirm traveller declaration and *Submit*
➢ Travel request approval required email sent to **Travel Approver**
➢ Request will appear in requester's and traveller's my.UQ dashboard - My requests

Requester on behalf of Non-UQ person

Traveller declaration does not apply to Non-UQ travellers
➢ Requester *Submit*
➢ Travel request notification email sent to requester
➢ Travel request approval required email sent to **Travel Approver**
➢ Request will appear in requester's my.UQ dashboard - My requests

12. Book Travel

➢ When UniTask Travel Request approved, travellers and travel bookers can proceed with travel bookings
➢ Refer to the UQ Travel Six steps to travel

13. Finalise Request

⚠️ Changes can only be made to Travel requests with the Status: **Awaiting Finalisation** or **More information required**. Refer to the User Guide: How to change a UniTask Travel Request.

Travel requests must be finalised by the Requester. It is recommended to finalise after travel is completed.
If travel does not take place, the Travel request must be withdrawn.

➤ From My requests dashboard, find the Travel request ID with *Awaiting finalisation* Status
➤ Select Update from the Action column

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
Travel request	Awaiting finalisation	Me	20 Oct 2022	29 Oct 2022	642055	Me	Update

➤ If required, update and make any changes to the Approved Travel request

Adding a destination/location requires a new Travel request form to be completed
(Primary reason for travel – Adding location to approved trip)

➤ Select [Finalise request]
➤ Travel request is now Finalised
➤ Finalised Travel requests will appear in the Completed view

Additional steps (if required after submission):

Resend Travel Request to FCM
➤ Approved Travel requests can be resent to FCM when Status = Awaiting Finalisation or Finalised
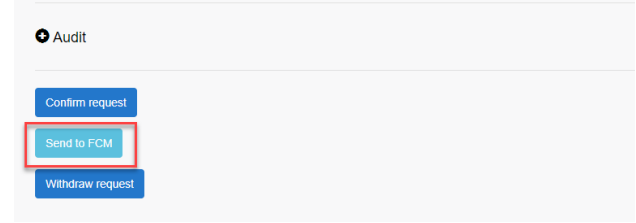
If status is Awaiting Finalisation
➤ Travel requests Awaiting Finalisation will appear in the Requesters UniTask My request dashboard under View Active

➤ Under the Audit tab, select Send to FCM

➤ The approved travel request is now emailed to FCM

If status is Finalised
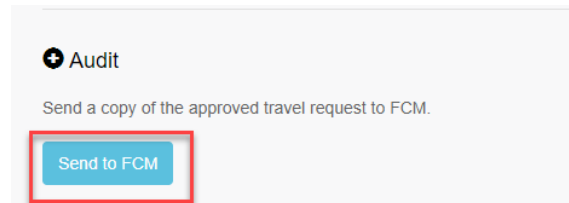➤ Finalised Travel requests will appear in the Requesters UniTask My request dashboard under View Completed

➤ Find the Travel request to send to FCM, select View
➤ Under the Audit tab, select Send to FCM

➤ The approved Travel request is now emailed to FCM

To Change a Request

Changes to the Travel request form can <u>only</u> be made by the **Requester** when:

➤ Status = Awaiting Finalisation or More information required; AND
➤ the Travel request is Assigned to the Requester in the UniTask dashboard
➤ Refer to the User Guide: How to change a UniTask Travel Request for more information

To Withdraw a Request

A submitted Travel request must be withdrawn if:
- ✈ the Primary destination has changed;
- ✈ changes are made to the departure and or arrival locations; or
- ✈ the planned travel is no longer taking place

Refer to the User Guide: How to change a UniTask Travel Request before Withdrawing a request.

A Travel request can only be Withdrawn by the Requester if the Status is:
- ✈ Awaiting finalisation; or
- ✈ More information required
- ✈ Travel requests will appear in the Requesters UniTask My request dashboard under View Active

- ✈ Find the Travel request to withdraw, select Update
- ✈ Under the Audit tab, select Withdraw request
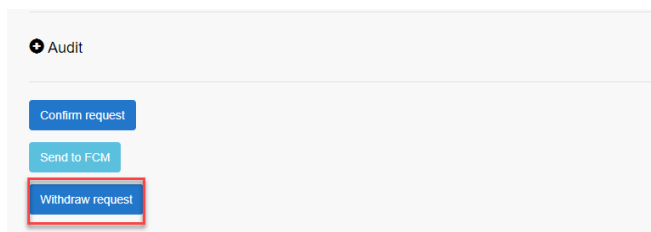
- ✈ The Travel request is now withdrawn
- ✈ Withdrawn Travel requests will appear in the Unitask My request dashboard under View Completed