

## Core Policy and Procedures Manual - Amendment Summary February 2011

---

### Policy

[10.0 Travel](#)

[10.3.16 Oracle iExpenses](#) - #4- Revised to remove the restriction for delegation of iExpenses entry to only Strategic Leadership positions. As a result of the Application Infrastructure Upgrade to CAS Oracle Financials in February 2011, iExpenses entry delegation is now a self-service function and no longer requires the restriction to positions.

\* Effective February 22, 2011

Thank you for visiting our web site.  
If you have any comments or questions, please [email us](#).

## Travel

---

### Table of Contents

10.0	Travel	
10.1	<a href="#">Objectives</a>	
10.2	<a href="#">General</a>	
10.3	<a href="#">Policy</a>	
10.3.1	<a href="#">Alternatives to Travel</a>	
10.3.2	<a href="#">Travel Approval</a>	
10.3.3	<a href="#">Combining Personal Travel</a>	
10.3.4	<a href="#">Out-of-Province/Country Travel</a>	
10.3.5	<a href="#">Airfare</a>	
10.3.6	<a href="#">Chartered Aircraft</a>	
10.3.7	<a href="#">Meals/Per Diems</a>	
10.3.8	<a href="#">Mileage</a>	
10.3.9	<a href="#">Vehicles</a>	
10.3.10	<a href="#">Accommodation</a>	
10.3.11	<a href="#">Miscellaneous Expenses</a>	
10.3.12	<a href="#">Loss or Damage</a>	
10.3.13	<a href="#">Travel Card</a>	
10.3.14	<a href="#">Volunteers</a>	
10.3.15	<a href="#">Contractors</a>	
10.3.16	<a href="#">Oracle iExpenses</a>	
10.3.17	<a href="#">Direct Invoicing</a>	
10.3.18	<a href="#">SMARTTEC Travel Emissions Calculator</a>	
10.4	<a href="#">Information and References</a>	
10.4.1	<a href="#">Group Information</a>	
10.4.2	<a href="#">iExpenses Information</a>	
10.4.3	<a href="#">Discount Lodging and Travel Tips</a>	
10.4.4	<a href="#">Minister Out-of-province/country Travel</a>	
10.4.5	<a href="#">Appointees to Crown Agency Boards and Administrative Tribunals</a>	

### 10.1 Objectives

- ensure effective travel management and administration, and promote economy and efficiency in the use of travel funds
- support government's commitment to carbon neutral business travel by making choices that mitigate the production of greenhouse gas emissions.
- establish standards to ensure:
  - travel expenses are proper, reasonable and necessary for program delivery
  - accountability for travel claim requests and approvals, and travel emission reports and approvals
- provide and promote alternatives to travel to carry out government business

## 10.2 General

Travel policy, allowances, reimbursement rates and limits are established by legislation and Treasury Board, and included in Treasury Board Orders, collective agreements, terms and conditions of employment for Order in Council and excluded employees, and the [Official Duties Expense Regulation](#) (BC Reg. 226/2001 as amended) for [officials](#).

Travel policy applies to ministries, offices, special funds, accounts and appropriations as defined in the [Financial Administration Act](#), the [Greenhouse Gas Reduction Targets Act](#) and applies where or when travel costs are funded by, or recovered from, outside parties. Where another government jurisdiction is reimbursing provincial employees that jurisdiction's travel rates will be used, which may be higher (e.g., Yukon, Northwest Territories).

Travel policy applies to employees (Groups I, II, and III) and [officials](#) (Group IV) unless specifically noted. For ease of use, the term "employee(s)" will be used throughout unless specific policy requires differentiation between employees and officials.

For the purposes of this policy, the terms "[minister](#)", "[official](#)", and "[official duties](#)" are used as defined in the [Official Duties Expense Regulation](#) (BC Reg. 226/2001 as amended).

Whenever possible, ministers and ministries are expected to promote the spirit and intent of government travel policy by requesting that similar policies are adopted by Crown corporations, public bodies, funded agencies and government contractors.

### *Roles and Responsibilities*

- Employees are responsible for:
  - obtaining expense authority approval to travel before expenses are incurred (See [10.4.4](#) for officials);
  - certifying that their travel expense claims are correct, complete and comply with policy; and
  - confirming that their travel emission reports are complete and attached to their travel expense reports.
- Expense authority officers are responsible for:
  - approving travel before expenses are incurred;
  - certifying that travel expense claims:
    - are for business purposes, appear reasonable and comply with policy;
    - that there are sufficient funds in the budget;
    - that travel related goods and services have been received; and
  - certifying that travel emission reports appear reasonable and are attached to employee travel expense reports.
- The BC Public Service Agency establishes travel policy and negotiates reimbursement rates and limits with bargaining units.
- The Office of the Comptroller General maintains policy and establishes procedures for the administration and processing of travel expenses, and advises ministries on travel policy and procedures.
- Purchasing Services oversees accommodation rates, manages fleet vehicles, negotiates rental rates with vehicle vendors, and supports negotiations with travel agencies.
- For the purposes of travel approval in the following policies, a "director" is defined as an employee holding the title of director, including an "executive director". A director makes travel approvals for their own staff, and directors and executive directors seek their program area assistant deputy minister's approval regarding travel. In turn, assistant deputy ministers seek the executive financial officer's approval regarding travel.

## 10.3 Policy

### 10.3.1 Alternatives to Travel

Ministries must consider alternatives to travel wherever practical. [Video conferencing](#) and [teleconferencing](#) and other methods are to be used where feasible to achieve cost savings and to mitigate the production of greenhouse gas emissions. These can be very effective tools to bring employees and others together across the province or country (e.g., business/project team meetings, interviews, hearings and trials, distance learning, training and workshops).

### 10.3.2 Travel Approval

1. The means of travel chosen needs to be operationally feasible, cost effective and consider travel methods that will mitigate the production of greenhouse gas emissions. Government employees are eligible for reimbursement of travel expenses when:
  - trip approval is obtained (from the employee's Expense Authority) before travel expenses are incurred;
  - the expenses are paid by the employee while on travel status\* or away from headquarters\*\*;
  - claims are reasonable, properly reported and comply with established rates and allowances; and
  - the travel emission report is completed and attached to the travel expense report.

\*Group [I, II and III](#) employees are on travel status when absent from their designated headquarters on approved government business. This does not apply to employees who are temporarily reassigned or on field status, or on board and lodging status.

\*\*An employee's headquarters is his/her usual work place or normal point of assembly and the area within a 32 kilometre radius. If necessary, the director must designate a headquarters for their staff, and can also approve changes to their staff's assigned headquarters as changes in operational conditions warrant. The designation for directors and executive directors are made by the assistant deputy minister of the program area. The executive financial officer must make designations for assistant deputy ministers.

The terms "travel status" and "headquarters" are not used in reference to Group IV travel policy. Travel policy applies to [Group IV](#) during the period an official is away from home to discharge official duties.

2. Reimbursement claims require approval by the appropriate Expense Authority before they can be paid. (see [Procedure Requirements - C.1.4, C.1.5](#))
3. Management has the right to designate an [employee's \(other than officials\) mode of transportation](#) and manner of accommodation. Other considerations must include:
  - the cost and efficiency of alternative transportation modes (i.e., time required to reach the destination and lost productivity);
  - additional travel costs (accommodation, meals, taxi, vehicle rentals, overtime) associated with each alternative; and
  - travel arrangements that mitigate the production of greenhouse gas emissions.
4. Government employees required to resource cabinet and government caucus meetings are eligible for reimbursement of expenses.

[Procedure Requirements - C.2](#)

### 10.3.3 Combining Personal Travel

1. Travel that combines government and personal business must be reimbursed at the lesser of
  - actual transportation expenses; or
  - an estimate of the minimum acceptable expenses that would have been incurred if the personal travel had not taken place.

2. Additional expenses arising from personal extensions to business travel are the employee's responsibility.
3. Expenses for an employee's spouse or family members are not reimbursable, except:
  - when a spouse is formally representing the government and a written invitation has been issued to the spouse (see also [10.4.4](#) and [C.14.3](#));
  - travel is to a pre-retirement seminar or awards function; or
  - the employee is relocating (for details refer to Administration, [Relocation](#)).
4. Employees must not claim any optional payments or surcharges related to carbon offset programs administered by travel service providers.

### 10.3.4 Out-of-Province/Country Travel

1. Staff (and contractor) out-of-province and out-of-country travel, including complete plans to combine personal travel, requires prior approval of the respective director (Treasury Board Directive [4/04](#)). Approvals for directors and executive directors are made by the assistant deputy minister of the program area. The executive financial officer must make approvals for assistant deputy ministers. Refer to [C.2](#) for staff approval procedures and to [10.4.4](#) for approval requirements for ministers, parliamentary secretaries, deputy ministers and ministers' office staff.
2. For out-of-province accommodation a reasonable amount must be established considering business requirements and federal accommodation rates. For out-of-country or U.S. accommodation, employees will be reimbursed for actual commercial accommodation expenses for the travel location up to those rates established by the federal government through their standing offer arrangements for accommodation. (Refer to this [federal accommodation site](#) for rate information.
3. For travel in the U.S. the Group I meal rate, Group II or III per diem allowance, or Group IV meal allowance must be the amount claimed for BC in U.S. currency (as required by [PSA Policy Statement 17. Travel, Appendix 1 sec. 8. \(1\)](#)), which will be converted to Canadian dollars, including claims for partial day travel. Meals received without charge or paid for from public funds cannot be claimed.
4. For other foreign locations (as required by [PSA Policy Statement 17. Travel, Appendix 1 sec. 9](#)), meal rates for full days must be calculated using the "Meal Total" rate published by the federal Foreign Affairs Department. This is then grossed up for incidental amounts as specified in the PSA table at Appendix 1 sec 9. (1).

For partial days or for situations where meals are received without charge or paid with other public funds, the related individual meals (using the federal Foreign Affairs Department rates) must be deducted from the full day rates calculated above. Where the individual meal rates are not published, refer to the percentages to deduct from the calculated full day rate specified in the PSA table at Appendix 1 sec 9. (2).

Procedure Requirements -- [C.1.6](#) (iExpenses & foreign exchange); [C.2](#) (Approval Requirements); [C.11](#) (Miscellaneous Foreign Travel Expenses)

#### [Foreign Travel Guide](#)

### 10.3.5 Airfare

1. The most economical airfare for air travel considering operational requirements and options that mitigate the production of greenhouse gases is required. This requirement may be waived in exceptional circumstances, with the prior approval of the director. For directors and executive directors, prior approval is sought from the assistant deputy minister for the program area. For assistant deputy ministers, it must be pre-authorized by the executive financial officer. Officials and accompanying staff are permitted airfare upgrades to executive or business class where the in-flight travel is four hours or more, and the purpose of the travel is to represent the government at a business meeting. The upgrade for staff only applies when there is a need to conference with the official during a flight.
2. Travel loyalty program benefits, such as airline frequent flyer points that are accumulated by employees while travelling at public expense, must not be used for personal benefit. Such benefits or discounts should be applied only against future business travel or donated to charities associated with the program. Benefits accumulated while travelling at

public expense should not be used beyond the term of employment.

#### [Procedure Requirements - C.7](#)

### 10.3.6 Chartered Aircraft

1. The use of a chartered aircraft by an official is permitted only when:
  - o there is no scheduled air service available that can meet the travel requirements (timing or duration) of the minister(s); or
  - o the charter cost is economical as compared to the scheduled air service; and
  - o the charter aircraft and crew meet the safety, maintenance and experience standards established by Transport Canada for such operations.
2. The use of chartered aircraft by employees must only be approved when there is no alternative means of transportation at a lesser cost, and within a reasonable time. The deputy minister or a delegated approval authority must approve in-province charter flights. Out-of-province charter flights require approval in advance by the respective minister.

### 10.3.7 Meals / Per Diems

1. Employees are entitled to claim meal or per diem allowances not exceeding specified limits for their applicable Group. For Group definitions refer to section [10.4.1](#).
2. On the date of departure, travel status must start before 7:00 a.m. to claim breakfast; before 12:00 noon to claim lunch; and, on the date of return, travel status must end after 6:00 p.m. to claim dinner.
3. See [PSA Policy Statement 17. Travel, Appendix 1 sec.1](#) for the applicable meal and per diem allowances for groups I, II, and III. For Group III employees, in determining whether it is reasonable to claim a full day, half-day or other per diem, they should consider the time spent and the number of meal periods while on travel status. Group II and III employees are entitled to the incidental amount when no meals are claimed on travel status (refer to CPM 10.3.11 [Miscellaneous Expenses](#)).
4. Group IV (officials) may claim a meal allowance of up to \$61.00 for each day (or portion of a day) the [official](#) discharges official duties, if the official is not at home while discharging those official duties. See the [Official Duties Expense Regulation](#) (BC Reg. 226/2001 as amended).

#### [Procedure Requirements - C.4](#)

### 10.3.8 Mileage

1. All groups are entitled to claim a [private vehicle allowance](#) for the use of a privately owned vehicle on business travel. For private vehicle insurance requirements, refer to [11.3.2 policy 3](#). Employees are expected to carpool where practical to minimize costs and the production of greenhouse gas emissions.
2. Employees may claim the vehicle mileage allowance where they are driven to the departure location (i.e., airport, bus, ferry or train terminal) and picked up upon return.

The portal-to-portal distance allowance (for travel to and from the employee's residence) must be authorized by the employee's Expense Authority before expenses are incurred. The Expense Authority must consider the cost and efficiency of alternative modes of travel before granting approval to an employee to take his/her vehicle to work for use when travel may be required. Allowance claims for vehicle mileage must not exceed 32 kilometres per day.

#### [Procedure Requirements - C.5](#)

### 10.3.9 Vehicles

1. A government or rental vehicle should be used when public transportation is not operationally feasible or a privately owned vehicle is not available or economical (i.e., when daily travel exceeds 150 kilometres). A government vehicle, where available, should be the first choice.
2. Employees renting vehicles must not purchase the Personal Accident Insurance option, as work-related accidents are covered by WorkSafe BC.
3. Employees using the corporate travel card must not purchase the Collision Damage Waiver option, as this is covered under the travel card. However, employees renting a vehicle outside of BC and not using the corporate travel card must purchase the Collision Damage Waiver option.

The vehicle rental rate table can be found at the [Purchasing Service's site](#). Refer to [section 11.3.4](#), Transportation policy, for the use of government vehicles.

#### [Procedure Requirements - C.5](#)

### **10.3.10 Accommodation**

1. Employees may use private accommodation instead of commercial accommodation and claim the private accommodation allowance of \$30.00 per night. Reimbursement for commercial accommodation within BC must be in accordance with the [hotel accommodation guide approved accommodation rates](#).

Accommodation expenses within BC that exceed the limits established by Treasury Board require pre-authorization from the individual's expense authority. Amounts in excess that are considered acceptable may be determined on a case by case basis, considering variables such as the urgency of the travel, whether travel is occurring in peak season and if accommodations at the established limits are not available. See also the [Accommodation Guidelines](#) (government access only).

For guidance on officials, see the [Officials Duties Expense Regulation](#) (BC Reg. 226/2001 as amended).

#### [Procedure Requirements - C.8](#)

### **10.3.11 Miscellaneous Expenses**

1. Employees are entitled to claim miscellaneous travel expenses for:
  - o [ferry tolls](#), [ferry reservation fees](#) and highway tolls
  - o airport improvement and security fees, NAV CANADA fees and applicable fuel charges
  - o bus/taxi/limousine services
  - o vehicle rental and related fuel charges
  - o parking charges
  - o business phone calls
  - o charges relating to cash advances obtained with the corporate travel card
  - o Group I employees are entitled to portage (maximum \$0.50), personal phone calls (one five-minute telephone call home for each night away), laundry and dry cleaning (after seven consecutive days on travel status).
  - o Group II and III employees receive a per diem that includes allowances for incidentals, such as gratuities, portage, personal phone calls, laundry or dry cleaning.
  - o Group IV officials are entitled to reimbursement for actual out of pocket expenses subject to this travel policy.

[See also C .9 - Miscellaneous Travel Expenses](#)

### **10.3.12 Loss or Damage**

1. [Extraordinary losses](#) incurred when an employee or appointee is on travel status, or while on government business, suffers damage to personal property are reimbursable to amounts allowable under [PSA Policy Statement 17. Travel, Appendix 1 sec.12](#).

[Procedure Requirements – C.19.2](#)

### 10.3.13 Travel Card

1. Employees must use their corporate travel card to pay for travel related expenditures and to obtain travel related cash advances (via ATMs).
2. Employees who are eligible for a corporate travel card cannot apply for an accountable travel advance. Accountable travel advances can only be issued to employees who are not eligible for the corporate travel card and the expense authority authorizing the travel must approve the accountable advance. The temporary advance must be repaid or accounted for within one week of the trip.
3. A standing accountable travel advance (issued to employees that require continuous or seasonal travel) must be repaid at the end of the designated period.

[Procedure Requirements - E.3](#)

### 10.3.14 Volunteers

1. Volunteers must not use Oracle iExpenses or the SMARTTEC travel emissions calculator. Volunteer out of pocket travel expenses will be reimbursed at the discretion of the host ministry. Meal allowances must not exceed Group I rates.

### 10.3.15 Contractors

1. Contractors must not use Oracle iExpenses or the SMARTTEC travel emissions calculator. Reimbursement for meals and incidentals must not exceed the Group II per diem rates. Refer to section [10.4.1](#), this chapter, for the definition of Group II.

[Procedure Requirements - C.10](#)

### 10.3.16 Oracle iExpenses

Oracle iExpenses is a web-based system for processing expense reports. When staff submit a claim, their electronic signature is equivalent to certifying that the expense report is correct, complete, complies with government policy, and their completed travel emission report is attached. The electronic signature of Expense Authority means that they agree the trip was for business purposes, the amounts appear reasonable, and that the employee has attached a travel emission report which appears reasonable. As well, they are certifying that there are sufficient funds in their budget and that travel related goods and services have been received. User IDs and Passwords MUST NOT be shared. Note that officials use an electronic travel voucher to process their claims. See [C.14.6](#).

1. Expense authority must review and approve expense reports and travel emission reports prior to giving their electronic authorization.
2. Travel expense receipts must ensure proof of payment and be accessible by expense authority for examination if requested. In addition the receipts, including those for [taxi and bus claims over \\$20 a day](#), and other supporting documents must be:
  - o filed at the location designated by the ministry chief financial officer (but not by the employee personally);
  - o filed in an Expense Report Envelope and forwarded upon request within 5 working days to the Corporate Compliance and Controls Monitoring Branch for verification.

The envelope must be retained as an Administrative Records Classification System (ARCS) file #1050-06. The ARCS and the Operational Records Classification System (ORCS) support policy in this section and the need to retain and manage records in accordance with government [Recorded Information Management](#) policy and standards.

3. Staff who do not travel more than once a year and who have claims of less than \$100 should be reimbursed by petty cash. Staff that have regular claims for mileage must claim reimbursement through iExpenses.
4. Delegates for iExpenses entry must not have an alternative delegate substituting for their leave or vacation period.

Deputy minister expense reports are to be routed to the Executive Financial Officer or Chief Financial Officer who will act as expense authority for approving these reports.

- All iExpenses users must complete any outstanding processing, and take appropriate action on any notifications, prior to transfer or termination. Ministry signing authority officers must be kept informed of any changes to prevent delays and errors when an expense authority departs prior to completion of processing.

[Procedure Requirements - C.1.6](#)

### 10.3.17 Direct Invoicing

- Airfare, except in an emergency or extenuating circumstances, must not be paid by the employees but billed directly to the ministry. For officials see [C.14.8](#).

[Procedure Requirements - D.7](#)

### 10.3.18 SMARTTEC Travel Emissions Calculator

SMARTTEC is a web-based tool for employees to use to calculate, track and report greenhouse gas emissions for business travel (i.e.: when on travel status or 32 kilometres or more outside of their designated headquarters, as defined by policy [10.3.2](#)). In advance or on trip completion, an employee or a delegate enters traveller information for the mode of travel (e.g.: type of flight, vehicle or ferry) and accommodation to calculate trip emissions.

- The travelling employee must confirm and submit their final SMARTTEC travel emission report, whether data entry is by a delegate or the employee. When a report is finalized a confirmation e-mail and PDF file is sent to the traveller's mailbox.
- The PDF file must be attached to the traveller's related iExpenses expense report (or manual FIN 10 Travel Voucher) for Expense Authority review and approval before payment can be authorized.

[Procedure Requirements - C.1.7](#)

Additional guidance on the use of SMARTTEC is provided at: [Where green ideas work](#). This site is available to Government of British Columbia intranet users only. For Tier 1 help desk queries on SMARTTEC contact 387-7000 or [e-mail: 77000@gov.bc.ca](mailto:77000@gov.bc.ca).

## 10.4 Information and References

### 10.4.1 Group Definitions

Employee Group definitions for travel entitlements pursuant to Treasury Board Order #88, as amended, and the [Official Duties Expense Regulation](#) (BC Reg. 226/2001 as amended) are as follows:

#### *Group I*

- employees who are members of the British Columbia Government Employees' Union (BCGEU), the Professional Employees Association (PEA), British Columbia Nurses Union (BCNU), Union of Registered Psychiatric Nurses of British Columbia (URPNBC), and Excluded Administrative Support Staff as specified on Schedule A of the Personnel Management Policies and Procedures manual, chapter 4.5;
- persons outside the government service such as employees appointed to boards, commissions and agencies in bargaining unit classifications, or persons performing equivalent administrative or technical support functions, plus persons on miscellaneous payroll;
- order in council appointees not specifically included in Groups II or III; and
- other employees or persons not specifically included in Groups II or III.

#### *Group II*

- persons whose positions are classified under the: Management Job Evaluation Plan, Levels 1 through 8; Legal Officer

Classification Plan; Legal Counsel Classification Series; or Salaried Physician Classification Plan; and

- persons appointed to part or full-time positions as members or managerial employees on boards, commissions or agencies.

#### *Group III*

- persons with the status of deputy minister or assistant deputy minister or equivalent status (positions classified at levels 9 through 12 of the Management Job Evaluation Plan); and
- a person appointed to the position of chief provincial court judge, associate chief judge or as part or full-time provincial court judges.

#### *Group IV*

- officials as defined by the [Official Duties Expense Regulation](#) (BC Reg. 226/2001 as amended); and
- a personal attendant where a physically disabled official requires an personal attendant in order for the official to travel to discharge official duties. The application of Group IV rates to a personal attendant is limited to transportation, meals, accommodation and out of pocket expenses necessarily incurred for the purpose of this travel. A personal attendant can be a spouse.

### 10.4.2 iExpenses Information

Information, training and guidance on how to use iExpenses are detailed on the CAS intranet site, [iExpenses Services](#). This information is available to Government of British Columbia intranet users only.

### 10.4.3 Discount Lodging and Travel Tips

Purchasing Services provides a list of lodgings and travel tips for employees on business travel. A number of properties offer discounts on room rates. These are listed by city or town on the [Business Travel Accommodation Listings](#) site.

### 10.4.4 Minister Out-of-province/country Travel

Approval for out-of-province and out-of-country travel is delegated as follows. A [Travel Authorization Form FIN 99](#) (government access only) is required:

<b><u>Traveler</u></b>	<b><u>Approved By*</u></b>
Minister (out-of-country)**	Premier
Minister (out-of-province)	Minister
Parliamentary Secretary	Minister
Minister's Office Staff	Minister
Deputy Minister (out of province)	Deputy Minister
Deputy Minister (out of country)	Minister

\* This authority cannot be delegated to a subordinate.

\*\* Ministers should submit a request for approval of their out-of-country travel plans not less than four weeks in advance of finalizing such plans. The request for authorization should be directed to Executive Branch, Office of the Premier.

The spouse of a minister may fly at government expense only when formally representing the government at a protocol related function and a written invitation has been extended to the spouse by the government or when acting as a personal attendant where an official has a physical disability. Guests of ministers may fly at government expense only when the guests are traveling on government business. Minister allowances are outlined in the [Official Duties Expense Regulation](#) (BC Reg 226/2001 as amended).

#### [Procedure Requirements - C.14](#)

### 10.4.5 Appointees to Crown Agency Boards and Administrative Tribunals

For policy on travel expense reimbursement for appointees to Crown agency boards and administrative tribunals refer to TBDs [2/10](#) and [1/10](#). All appointees (including those receiving no compensation) incurring transportation, accommodation,

meal and out-of-pocket expenses in the course of their duties as members of a Crown agency board or administrative tribunal will be reimbursed in accordance with Group II rates. Rates of reimbursement for travel-related expenses are established by Treasury Board Order #88. At the discretion of the minister, airline costs incurred by Crown agency boards or administrative tribunal appointees may be directly billed to the Province.

[Procedure Requirements - C.20](#)