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**VCAA Travel Bookings and Personal Expenses Reimbursement Guidelines Booklet for VCAA Levels 1 – 5**

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1. Introduction

**Purpose**

The purpose of this Guidelines Booklet is to provide comprehensive and clear guidance on the Victorian Curriculum and Assessment Authority (VCAA) Travel and Expenses Policy for all employees. It aims to ensure consistent understanding and adherence to policies governing authorised work-related travel, personal expenses, and reimbursement procedures in accordance with Ministerial Order No. 1451 (The MO).

**Overview of Whom the Guidelines Apply to**

These guidelines apply to all employees (fixed term, casual, sessional) employed under the MO, classification VCAA Levels 1 – 5 who are required to undertake work-related travel as part of their responsibilities. It is essential for employees to familiarise themselves with these policies to facilitate compliant and efficient travel and personal expense management practices.

**Importance of Following Policies and Procedures**

Adherence to these policies and procedures is crucial to maintain organisational transparency, accountability, and compliance with regulatory standards. By following these guidelines, employees ensure the responsible use of VCAA resources and uphold ethical standards in all travel and expense-related activities.

By providing the following resources in the form of a travel e-pack email, the VCAA aims to equip employees with the tools and information necessary to navigate travel arrangements and expense claims efficiently and in compliance with organisational policies. This ensures that all travel-related activities are conducted in a manner that supports VCAA's operational objectives while maintaining fiscal responsibility and accountability.

1. VCAA Travel and Personal Expenses Rules and Guidelines Booklet
2. VCAA Travel and Expenses Policy
3. VCAA Vehicle Rules of Use Guideline
4. [VCAA Application and Approval to use Private Vehicle Form](https://www.vcaa.vic.edu.au/Documents/workwithus/HR/VCAAPrivateVehicleonOfficialDuty.pdf)
5. [VCAA Travel and Accommodation Booking Request Form](https://www.vcaa.vic.edu.au/Documents/workwithus/HR/VCAATravelBookingRequestForm.docx)
6. [VCAA Travel and Personal Expenses Claim Form](https://www.vcaa.vic.edu.au/Documents/workwithus/HR/VCAATravelReimbursementForm.xlsm)
7. Contact Information

For all inquiries or assistance regarding the VCAA travel e-pack, travel bookings (flights, accommodation, hire cars), and expenses or reimbursements:

|  |
| --- |
| Human Resources |
| **Phone:** 1800 718 320  **Email:** VCAA.HR@education.vic.gov.au |
|  |

1. VCAA Values (Our Values)

The VCAA has adopted the public sector values for employees which are set out in the Code of Conduct:

**Responsiveness:**

* providing frank, impartial and timely advice to the Government
* providing high quality services to the Victorian community
* identifying and promoting best practice.

**Integrity:**

* being honest, open and transparent in their dealings
* using powers responsibly
* reporting improper conduct
* avoiding any real or apparent conflicts of interest
* striving to earn and sustain public trust of a high level.

**Impartiality:**

* making decisions and providing advice on merit and without bias, caprice, favouritism or self interest
* acting fairly by objectively considering all relevant facts and fair criteria
* implementing Government policies and programs equitably.

**Accountability:**

* working to clear objectives in a transparent manner
* accepting responsibility for their decisions and actions
* seeking to achieve best use of resources
* submitting themselves to appropriate scrutiny.

**Respect:**

* treating them fairly and objectively
* ensuring freedom from discrimination, harassment and bullying; and
* using their views to improve outcomes on an ongoing basis.

**Leadership:**

* actively implementing, promoting, and supporting these values.

**Human Rights:**

* making decisions and providing advice consistent with human rights
* actively implementing, promoting, and supporting human rights.

Our Values underpin how employees interact with colleagues, individuals, members of the community, and others. All employees are all required to uphold and demonstrate Our Values in their work.



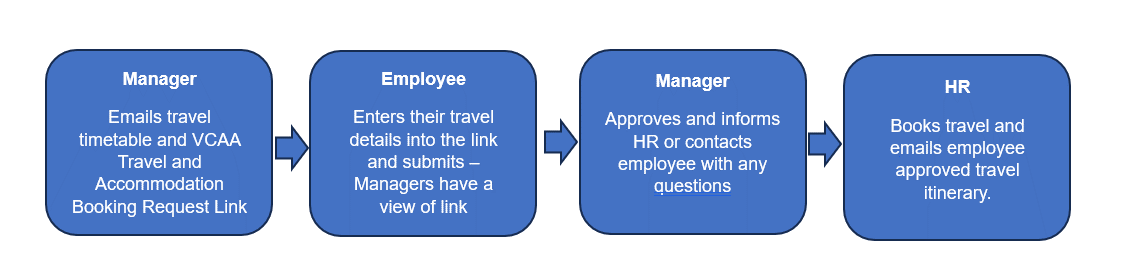
1. Roles and Responsibilities

The table below details the roles and responsibilities of Managers, Employees and Human Resources (HR) in the travel bookings and personal expense reimbursement process:

|  |  |  |
| --- | --- | --- |
| **Managers** | **Employees** | **Human Resources** |
| * Communicate travel requirements and forward the VCAA Travel and Accommodation Booking Request form to employees. * Manage and approve employees' travel costs to ensure they are justified, reasonable, and compliant with company rules. * Monitor policy compliance among employees and intervene as necessary. * Offer guidance and support to employees regarding travel and expense policies. * Promptly and fairly resolve any issues related to travel and expenses. * Maintain transparency and accountability throughout the process. | * Understand and adhere to the guidelines outlined in the travel and expense policy. * Obtain approval for all travel and use of personal vehicles for VCAA purposes. * Seek pre-approval for expenses and ensure all expenditures are justified. * Maintain accurate documentation supported by receipts for expense claims. * Promptly submit expense reports for reimbursement. * Use VCAA resources responsibly and uphold ethical standards to prevent any perception of fraudulent conduct. * Proactively identify and manage risks associated with travel and expenses. | * Provide employees with the travel e-pack and ensure they have access to necessary travel and expense information. * Handle travel bookings in accordance with VCAA policy requirements. * Liaise with employees regarding their travel arrangements and bookings. * Manage authorised work-related travel expenses and ensure reimbursements are processed timely. |

1. Travel Booking Guidelines
   1. Booking and Approval Process

Prior to any work-related travel employees will need to receive approval from their manager and complete the travel booking request form.

* **Roles and Responsibilities flow:**
  1. Changes to Travel Bookings

Employees needing to modify their booked travel arrangements should contact HR via email or phone at least 48 hours before their travel begins.

Change requests submitted via email, include the details below in the subject line:

* VCAA ID
* first and last name
* travel dates

In the body of the email, specify the requested changes.

Change request via phone: When contacting HR via phone, have the above information to facilitate the process efficiently.

1. Travel Arrangements
   1. Flights

Economy/Domestic Class available seats only will be booked on flights.

* 1. Accommodation

Accommodation is approved for instances where extended travel to work locations is required over multiple days, or when returning to the base location on the same day is not feasible due to time constraints.

HR will arrange accommodation that meets approved standards and is conveniently situated relative to work-related duties.

Employees will receive preliminary advice from HR regarding travel options, especially in cases where flights are affected.

* 1. Meals and Incidentals

Employees will be reimbursed for the itemised category allowances up to the following maximum amounts as outlined in Table A.

**Table A: Allowance Amounts**

|  |  |  |
| --- | --- | --- |
| **Itemised Category** | **Rural** | **Metro** |
| Breakfast | $30.35 | $33.90 |
| Lunch | $34.65 | $38.10 |
| Dinner | $59.75 | $64.95 |
| Incidentals | $23.95 | $23.95 |

**Reimbursement for expenses:**

* Meals can only be reimbursed for authorised VCAA work-related day duties and overnight stays in a specified work location.
* Reimbursement allowance amounts are determined by the VCAA, ensuring compliance with Australian Taxation Office (ATO) guidelines.
* Receipts must strictly adhere to meal cost limits, and any amounts exceeding the limit will be automatically adjusted during processing.

**Split Bills:**

* If a bill cannot be split and one employee pays the entire amount, they must identify the individuals they paid for.
* Other individuals must sign the bill to confirm agreement and refrain from claiming similar expenses to avoid delays in allowance processing.

**Specific Dietary Requirements:**

* Employees with specific dietary needs can purchase food items at supermarkets.
* Purchases must be justified and must not exceed allowance amounts specified below.
  1. Ground Transport

**Travel notification:**

* Employees will be notified of travel requirements by their manager, which may also be outlined in their Letter of Offer of Employment.

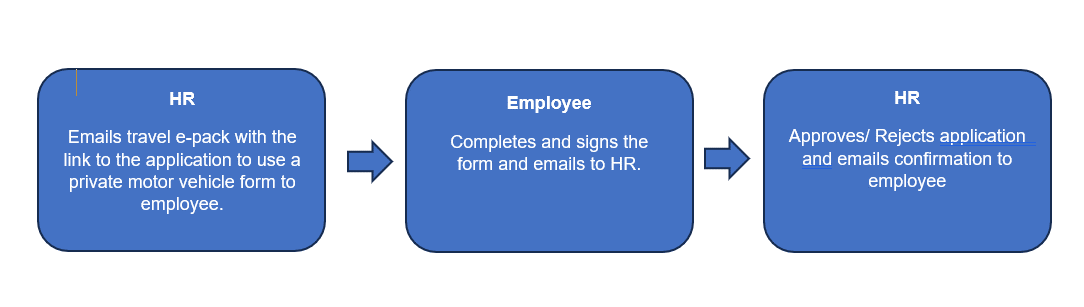
**Transportation modes:**

* The VCAA may require employees to use and comply with specific transportation modes for their roles, such as public transport including trains, trams, buses, and ferries.

**Responsibility for fines and infringements:**

* Employees are personally responsible for fines or infringement notices resulting from their use of all motor vehicles for VCAA work-related purposes. If a fine occurs while using a hire vehicle, HR will notify the issuing authority the driver's details within the specified timeframe.
  1. Private Motor Vehicle Use

Employees are required to complete and sign the application to use a private motor vehicle form and email to HR, before using a private vehicle for VCAA work-related purposes. This process is essential to guarantee that all information regarding an employee’s private motor vehicle is recorded and compliant, and that necessary arrangements are in place and that employees meet the required criteria for claiming the kilometre allowance rate.

* **Private motor vehicle use application process flow:**

In the instance where an employee does not have comprehensive car insurance for their private motor vehicle, booking a hire vehicle is an available option.

**To request the use of a private motor vehicle the following conditions must be met**:

* the private motor vehicle must be registered in the employee’s name
* the private motor vehicle should have full comprehensive insurance, which includes liability where reimbursement is sought for the use of a private motor vehicle
* liability at law for damages and an endorsed indemnity to the employer
* the employee must hold a current driver’s license and comprehensive car insurance.

**Sharing driving:**

* When multiple employees share the driving of a private motor vehicle for VCAA work-related purposes, each employee must complete and sign an application and approval to use a private motor vehicle form. This ensures that each driver is authorised and approved to utilise the private motor vehicle, and it helps maintain a record of employees permitted to use the vehicle.

**Reimbursement for expenses:**

* All employees using their private motor vehicle for work-related travel will be reimbursed based on the business-related kilometres travelled, as authorised by the VCAA. This reimbursement rate covers all associated vehicle costs, including petrol and maintenance.
* Following the use of a private motor vehicle, reimbursement claims must be submitted using the claim form and accompanied by itemised receipts.
* Petrol costs cannot be claimed separately when using a private motor vehicle.
* Employees are only allowed to claim expenses related to kilometres driven and cannot claim any other motor vehicle expenses.
* When multiple employees are travelling from nearby base locations to attend the same venue, carpooling is encouraged, however reimbursement will only be made to the employee who incurs the travel cost.
* Parking costs are reimbursable upon submission of appropriate receipts.

**Allowance Amount (*Rate adjusted as per advice from ATO based on 2024-5):***

|  |  |
| --- | --- |
| **Private motor vehicle** | **Rate per km** |
| All private motor vehicles | 88 cents |

* 1. Hire Vehicles

**Booking Information:**

* VCAA uses Avis and Hertz as preferred hire vehicle suppliers.
* Employees are not permitted to book hire vehicles themselves.
* If a hire vehicle is procured without approval from VCAA HR, the employee is responsible for all costs incurred.

**Hire Car Booking Process:**

* Booking requests for hire cars must be submitted using the booking form from the travel e-pack.
* Requests should be sent to HR at least 5 business days before the required date or upon employees' work schedule confirmation.
* Pickup and drop-off times must be clearly specified on the booking request form.

**Collection and Drop-off Times:**

* Employees must adhere to the hire vehicle companies’ rules for collection and drop-off times, including outside standard business hours. Meeting designated pickup and drop-off times avoids additional costs unless justified.

**Declining Additional Offers:**

* When picking up a hire vehicle, employees must decline all additional offers such as the Renter Protection Package or Accident Excess Reduction package.

**Petrol Refill Requirement:**

* Before returning a hire car to its depot, employees must ensure the petrol tank is refilled to the required level.

**Toll Charges:**

* Employees using a hire vehicle for travel on toll roads will be invoiced for the incurred toll costs.

**Reporting Road Incidents:**

* In case of a road incident while using a hire vehicle, employees must promptly notify their manager or HR in writing. They should include a copy of the accident report provided by the hire vehicle company detailing the incident.

**Reimbursement for expenses**

* Top of Form
* Bottom of Form

**Travel to Hire Vehicle Depots:**

* Employees can claim reimbursement for travel to and from the hire vehicle depot, covering distances from the specified work location to the depot and return. This also includes expenses for taxis or public transport used for this purpose.

**Petrol Purchase:**

* If petrol is purchased for a hire vehicle, employees must provide proof of purchase (receipt) to be eligible for reimbursement.
  1. Public Transport

Public transport should be used, unless; it is deemed impracticable, the travel occurs outside of standard business hours, or it is considered expeditious or more economical for an employee to travel by an alternative form of transport.

**Reimbursement for expenses:**

* Claims for all forms of public transport fares are permitted (eg. public transport - train, tram, bus, ferry) and will be reimbursed, provided proof of ticket (receipts) is provided.

**Travel Records:**

* Employees should ensure they meet ATO requirements in relation to keeping travel records such as ticketing information, receipts, and diary entries.

**Myki Cards:**

* Reimbursement claims for use of a Myki card must include a copy of the employees’ Myki account or other similar evidence or else the request will be denied. It is important to note that top up receipts for Myki cards are not acceptable as they are not actual proof of travel and will not be reimbursed.
  1. Use of Taxis and Ride Sharing

**Acceptable Use of Taxi Services:**

* Travel to and from hire car depots or airports where no other reasonable option is available.
* When no other reasonable travel options exist.
* In cases of sudden plan changes or emergencies. Prior consultation with VCAA HR is required before using ride-sharing services

**Reimbursement for expenses:**

* Clear evidence of the travel including the day and or/date must be evident for reimbursement. It is important to note that receipts with no other detail will not be reimbursed.

1. Expense Submission and Approval

**Submission Process**

* **How to submit expenses**: Utilise the claim form from the travel e-pack and attach itemised receipts.
* **Timelines for submission**: Submit claims and receipts within 3 months of travel completion for timely reimbursement.

**Approval Process**

* **Who approves expenses**: Designated managers or HR personnel handle expense approvals.
* **Criteria for approval**: Expenses must align with VCAA's travel and expense policies and be justified as work-related.

**Reimbursement Process**

* **Timeline for reimbursement**: Claims undergo validity checks and are promptly processed for payment.
* **Payment methods**: Reimbursements are exclusively via Electronic Funds Transfer (EFT) to nominated bank accounts.

**Additional Notes:**

* Claims must reflect actual "out-of-pocket" VCAA work-related expenses, including travel, accommodation, and justified personal expenses like meals.
* Itemised receipts must include GST details, purchase date/time, business name/location, and items purchased.
* Reimbursements cover total out-of-pocket expenses including GST; incomplete EFTpos receipts are ineligible.
* Non-compliance requires employees to cover costs exceeding allowable limits.
* Expenses not covered under VCAA policy may be reimbursed if necessary and supported by receipts.
* Claims require justification on the claim form, explaining the necessity of each expense.
* Pre-approval from managers or HR is required for uncertain cases before activities begin.

**How to Submit Reimbursement Claims:**

* Use the travel e-pack claim form and attach itemised receipts.
* Submit claims within 3 months of travel completion to ensure timely reimbursement.
* Reimbursement process:
  1. Submission of claim form with itemised receipts.
  2. Review for validity and completeness.
  3. Payment via EFT to nominated bank accounts.

**Reimbursement process flow:**

Top of Form

Bottom of Form

1. Additional Information

**Weather event leave:**

* In the event of unexpected weather conditions impacting an employee's ability to travel to and from their specified work location, the VCAA may provide special leave and allowances for up to 5 days. This will be in accordance with the employees' Letter of Offer of Employment.

**Hospitality expenses:**

* Reimbursement for hospitality expenses, such as catering, beverages, and similar items, is not permitted under this policy. Any catering required must be pre-approved and handled as procurement by the VCAA. Invoices from the catering business are required for expenditure approval.

**Allowances:**

* An employee who is directed to work a specified work location may be entitled to be reimbursed for time reasonably spent in travelling to and from their base location and the specified work location that is outside normal working hours and in excess of the time normally spent in travelling from the place of residence to the usual place of work and return.
* Reimbursement will only be granted where excess travel time is greater than 30 minutes one way. In respect of any period of excess travelling time incurred, the employee may be reimbursed at the ordinary rate of pay (calculated to the nearest quarter hour). I.e. if it takes an employee 1 hour to get to the specified location, the first 30 minutes is not considered excessive travel time, however the additional 30 minutes after this would be claimable.
* Excessive travel time should be claimed on the employee’s timesheet.

1. Payments

**Why did I not receive payment on the expected pay date?**

Payments associated with a specific role are processed at the one time. For example, payments for training days worked and expenses claimed would be processed at the one time, provided information is submitted, validated, and approved in a reasonable timeframe prior to the pay date.

Otherwise:

* The employee did not accurately complete their payment information.
* The employee recently updated their bank details but did not notify the VCAA.
* The employee failed to submit their claim form within the specified timeframe.
* The claim form contained errors, including incorrect or excessive amounts, or claims for days not scheduled to work.
* The employee's claim form included expenses for multiple individuals, which was unclear.
* The employee's claim lacked sufficient detail, such as itemised receipts.

1. Employee Acknowledgement

Upon review and acceptance of VCAA travel information, you are expected to adhere to the following:

* Understand and comply with the VCAA Travel and Personal Expenses Policy, and this booklet regarding travel expenses and personal expenses incurred during official duties.
* Adhere to the Vehicle Rules of Use Guidelines governing the use of private vehicles for VCAA official purposes.

By indicating your acknowledgement and agreement to these terms, you confirm your understanding and commitment to fulfill your roles and responsibilities at VCAA.