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Policy by the Rector's Office

on Granting Travel Allowances to Members of the Academic University Staff

Ruling of the Rector's Office as from 03/09/2017

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Policy by the Rector's Office
on Granting Travel Allowances
to Members of the Academic University Staff

Preamble

Beginning April 1, 2017, this policy shall replace the Operation Agreement on Granting Travel Allowances, which has been in place since 2011, and subsequently provides the central basis for the planned implementation of an electronic travel workflow at the University of Graz. As a result of this, and with the discontinuation of the fixed “contributions” that were common before, the administrative procedures concerning travel allowances shall be significantly simplified. Through clear procurement principles, central objectives, such as supporting junior scientists and equal treatment of employees, are still established. With this policy, the university is continuing its efforts to strengthen the international networking and mobility of its scientists.

§ 1 Scope

- (1) This policy applies to all employees who are members of the academic university staff. The content of this policy applies to civil servants under the Civil Servants Act 1979 (*Beamten- Dienstrechtsgesetz, BDG*), as well as to former contractual employees under the Contractual Employees Act 1948 (*Vertragsbedienstetengesetz, VBG*), unless the Travel Fees Regulation 1955 (*Reisegebührenvorschrift, RGV*) sets out other mandatory provisions.
- (2) Considering that both civil servants and employees (former contractual employees and employees under the Wage Agreement for Employees of Universities [*Universitäten-KV*]) are employed with the *Karl-Franzens-Universität Graz* (hereafter University of Graz), the term “employees” will be hereafter used for both groups of persons equally.
- (3) The policy applies to all locations of the University of Graz.

§ 2 Definition and demarcation of business trips

- (1) Travel activities incurred while conducting business may either be undertaken within the framework of a business trip or a leave of absence involving a travel allowance (*Reisekostenzuschuss, RKZ*). An approved business trip excludes receiving a travel allowance for the same purpose and vice versa.
- (2) A business trip occurs when the employee travels to a place outside his/her place of employment in order to complete his/her official assignment or because of business-related instructions. For employees of the university, regulations of the Operation Agreement concerning the requirements and terms, as well as the amount of the compensation for business trips, apply in this context; regulations of the Federal Travel Fees Regulation (*Reisegebührenvorschrift des Bundes*) apply to civil servants and former contractual employees.
- (3) A leave of absence involving a travel allowance occurs if the employee travels to a place outside his/her place of employment while within the scope of his/her research and teaching assignment, but also of his/her own accord (academic progress). In this context, the employee receives partial compensation for expenses incurred. Derived from Public Service Law,

the term “leave of absence” (*Freistellung*) is used analogous to this form of business-related absence of employees whose employment relationship is subject to the regulations of the *Universitäten-KV*.

§ 3 General principles on granting travel allowances

- (1) Travel allowances are granted according to the principles of efficiency, economy and expediency, as well as equal treatment of employees and realization of equal treatment of men and women regarding labor and payment conditions.
- (2) When granting travel allowances, physical impairment of employees (esp. disabilities or chronic illnesses) shall be taken into particular consideration. Traveling within the scope of research and teaching assignments shall be made possible despite such restrictions.
- (3) Granting travel allowances shall be used specifically as a means of supporting junior scientists. In this context, special consideration shall be given to objectives that are established within qualification and development agreements.
- (4) The resources available for travel within an organizational unit are to be used transparently according to the principles above for travel activities of members of the academic university staff. In this regard, it is possible to set a maximum limit within a particular observation period. Fixed “contributions” of employees, which were common until 03/31/2017 under the Operation Agreement on Granting Travel Allowances, are excluded.
- (5) Before applying, the applicant must find out whether traveling can be avoided by taking part in a video conference. For this purpose, a video conference room is available at the University of Graz which can accommodate several people.

§ 4 Commencement and completion of travel activities within the scope of a leave of absence involving a travel allowance.

- (1) The application for a leave of absence involving a travel allowance must be approved by the head of the academic unit and the head of the organizational unit before the respective travel activity.
- (2) Travel activities within the scope of a leave of absence involving a travel allowance begin with the departure from the place of employment, if departing from there, or, if necessary for travel, when departing from the nearest residence of the employee. They end when returning to the place of employment or, if necessary for travel, when returning to the residence.
- (3) If the start or end of a travel activity falls on a non-working day (Saturday, Sunday, holiday) or starts/ends during a working day, it is necessary to apply for a leave of absence for these days for reasons regarding insurance regulations.
Travel activities involving a travel allowance shall be limited to the required duration, i.e. they are to be planned in a way that additional expenses are reasonably avoided, especially expenses for overnight stays. Travel activities can be reasonably expected if they start after 6:00 a.m. and end before 10:00 p.m. If cheaper fares (e.g. APEX fares for flights) neutralize costs for an additional overnight stay, they may be utilized. Timely planning of the

travel activity by the employee is recommended in order to ensure inexpensive fares.

§ 5 Criteria for reimbursement

- (1) Within the scope of a travel allowance, the following expenses may be reimbursed up to the maximum limits pursuant to subs. 2, if they are documented adequately:
 - a. Travel expenses
 - b. Accommodation expenses
 - c. Conference fee, convention fee etc.
 - d. Additional expenses
- (2) Overview of refundable expenses and maximum limits:

Expenses	Services	Maximum limits	Notes
Travel expenses	Train travel	<u>National:</u> Businesscard (train travel second class) <u>International:</u> Businesscard (train travel second class or in exceptional cases according to price list of the railroad company second class)	If no documentation is provided (e.g. when using a private car without approval), a travel subsidy in accordance with the <i>RGV</i> is paid out upon request.
	Public means of transport	as per supporting documents	e.g. bus, streetcar, subway
	private car	official mileage allowance	Approval only in justified exceptional cases; parking fees and tolls (if applicable) are included
	Taxi, rental car	as per supporting documents	Approval only in justified exceptional cases
	Air travel	as per supporting documents	Only above 300 rail kilometers, only economy class
Expenses for overnight stays	Austria	maximum of €110	Per overnight stay according to supporting documents Exceptional case: It is permissible to exceed this sum due to special needs (e.g. physical impairment)
	Europe	maximum of €160	
	outside of Europe	maximum of €200	
Additional expenses		as per supporting documents	e.g. expenses for a visa in case of international travel, conference fees, costs for expenditures necessary for business

- (3) Fixed rates for daily or overnight expenses cannot be reimbursed within the context of travel allowances. Furthermore, (documented) subsistence expenses, as well as costs for travel (health) insurance and travel cancellation insurance will not be reimbursed.
- (4) If the employee receives financial aid from a third party for his/her travel activity, this information must be disclosed on the application whenever possible. This amount will be deducted from the total costs.
- (5) Employees who receive bonuses for business travel activities (especially bonus miles for enrolling in frequent flyer programs) must use them for business purposes only.

§ 6 Application and approval procedure

- (1) The employee must apply for a leave of absence involving a travel allowance early enough to allow the approval procedure to be completed before the departure. Thus, application is recommended three weeks prior to any planned departure.
- (2) The application shall be submitted to the head of the academic unit who is required to process the application as quickly as possible and forward his/her opinion immediately to the head of the organizational unit.
- (3) The head of the organizational unit decides based on the opinion of the head of the academic unit on the requested leave of absence involving a travel allowance and forwards his/her decision for further action to Human Resources.

§ 7 Travel reports and expiration

- (1) Travel allowances are processed and assigned for payment upon completion of the travel activity. The travel report must be submitted by the employee within six calendar months beginning with the calendar month in which the business trip ended to avoid expiration (i.e. loss of claim). The travel report must be submitted before termination of the employment relationship.
- (2) All receipts and evidence of payment must be enclosed in original with the travel report. Billings without distinct evidence of payment (e.g. online bookings) require supporting documents (e.g. credit card bill). The employee shall make copies of supporting documents and evidence of payment in advance when necessary (e.g. for income tax return). Incomplete travel reports cannot be processed until the employee provides all necessary details.
- (3) Only expenses that the employee had to bear himself/herself can be reimbursed. It is not permissible to complete a travel report for traveler companions. Payment is transferred along with the next salary through the payroll account.
- (4) When applying for a travel allowance, an advance may be requested which may not exceed the expected travel expenses. Every advance must be processed with the business trip, for which it has been granted. If a trip, for which an advance has been received, is canceled or postponed for an indefinite period of time, the head of the academic unit, the head of the organizational unit and Human Resources must be informed at once. In this case, the repaid advance will be deducted from the next salary. Likewise, an advance or remainders of an advance are deducted from the salary,

if the period for submitting the travel report expired or if the actual travel expenses are below the received advance. When terminating an employment relationship, open advance balances must be repaid or may be deducted from salary.

§ 8 Special provisions for granting travel allowances funded by third parties

The following special provisions apply for travel allowances funded by third parties:

- (1) The authorized project supervisor decides on the use of travel allowances funded by third parties. He/She must ensure compliance with the sponsor's requirements.
- (2) The maximum limit and criteria determined under § 5 subs. 2 and 3 can be adjusted to meet the sponsor's requirements with the consent of the authorized project supervisor. Fixed rates for daily or overnight expenses will not be reimbursed.
- (3) For employment relationships that are funded solely by third parties, the authorized project supervisor also decides on the requested leave of absence.
- (4) Travel reports for travel allowances funded by third parties are to be submitted within a period of six months, as indicated under § 7 subs. 1, or before completion of the project (if this occurs within the six month period) to avoid expiration. The authorized project supervisor reviews the travel reports, with particular regard to compliance with the sponsor's requirements.

§ 9 Traveling within the framework of mobility programs

Traveling within the framework of mobility programs remains unaffected by this policy. The Office of International Relations is responsible for applications and processing, especially for granting the respective funding rates.

§ 10 Final provisions

This policy by the Rector's Office of the University of Graz shall come into force as of April 1, 2017 and is henceforth valid for all incoming applications for granting travel allowances until recalled.

The rector:
Neuper