LEGACY BRISBANE

TRAVEL PROCEDURE

Associated Policy number: **FIN-001**

Effective date: **06/08/2026**

Approving authority: **CEO**

Sponsor: **Finance Manager**

Web address: **www.legatee.guide**

Date for review: **06/08/2029**

Version History

Date	**Description of Change**	**Version**
22/07/2019	Initial release	1.0
01/03/2021	Update reimbursement for legatee and volunteer private vehicle use	1.1
17/03/2023	Updated Travel Policy review	2.0
18/08/2025	Updated Travel Policy review	2.1
06/08/2026	Updated Travel Policy review	3.0

Approval

Prior to travel, all travellers need to obtain written approval for the travel. The request needs to include:

- Traveller's name and position.
- Purpose of the travel.
- Alternatives considered rather than travel.
- Itinerary for the proposed travel.
- Anticipated costs for the proposed itinerary.
- Cost of the most direct, economical and logical route and mode of transport.
- Request and justification for any deviation from the most direct, economical and logical route and mode of transport.

Traveller	Approving Manager
Staff member, Legatee, Volunteer	Within budget - Department Manager Outside budget - Department Manager and then CEO
Department Manager	CEO
All international travel	Board

All travel requests must be submitted within a sufficient timeframe to allow consideration and approval by the relevant authority.

The traveller and their Department Manager / Group Chair shall agree on any appropriate welfare check(s) for the approved travel.

Booking

All travel should be booked in advance.

Forward the written approval for the travel to the Executive Assistant, along with traveller's details.

Executive Assistant will then book any air travel, car hire and accommodation in line with policy, using the preferred travel supplier, unless otherwise approved by the CEO.

- General guidance from the policy is that:
  - Air fare – economy – best fare of the day
  - Car hire – compact or intermediate
  - Accommodation - in accordance with the ATO's published reasonable accommodation expenses for the location and relevant year. For 2026-27 tax year, these are in TD 2026/4.
- When booking travel consideration will be given to availability, proximity, appropriateness and standard required. The accrual of loyalty points, such as frequent flyer points will not be taken into consideration when booking travel.

Executive Assistant will give a copy of the travel arrangements / itinerary to the traveller.

The traveller should give a copy of the approved itinerary their Senior Manager / Group Chair, including with it agreed welfare check arrangements where appropriate.

Whilst travelling

Traveller to obtain and retain itemised Tax Invoices or receipts for expenses. Travelling staff to record working hours (refer Travel Policy).

Make the welfare check phone calls as agreed in the travel plan/itinerary.

Travellers are expected to comply with the Code of Conduct, Workplace Health and Safety along with all other relevant policies at all times.

Reimbursements

Complete the Payment Request Form (Brisbane Sharepoint\All Staff\Stationery & Forms), attaching the original itemised Tax Invoices or receipts for expenses.

Statutory declarations as substitutes for itemised receipts/tax invoices will not be accepted except in exceptional circumstances. Before a statutory declaration is accepted, the traveller must supply complete details of the expenses for which a reimbursement is being requested and details as to why the original documents are not available.

Personal vehicle use reimbursement requests should include supporting documentation for the business kilometres travelled e.g. travel purpose, travel diary with odometer readings or printout from online mapping tool.

Department Manager to sign request form checking that the costs are line with the policy, particularly the maximum amounts payable. Any deviation from the policy will need to be specifically noted with justification and approval.

The Evaluation and review

The references in this procedure to the current ATO Tax Determination on reasonable travel and overtime meal allowance expense amounts (ATO TD 2026/4) to be reviewed and updated annually, ideally in July.

This procedure will be reviewed by the Finance Manager at a minimum of every time the associated Travel Policy is updated.

References and linkages

Legacy Brisbane Travel policy

Legacy Brisbane Motor Vehicle policy

Legacy Brisbane Credit card usage policy

Legacy Brisbane Payment Request Form

ATO published reasonable travel and overtime meal allowance expense amounts (Taxation Determination issued each year). *For accommodation expenses only.*