

HONG KONG BAPTIST UNIVERSITY
FINANCE OFFICE
MEMO

To : All Staff Members
From : Adonis Lee, Director of Finance (Ext. 8390)
Date : 15 April 2025

We would like to inform you that the following changes related to the Business Travel Policy were approved by Senior Management on 15 April 2025, and it will be effective immediately.

1. Train/Rail/Ferry Seating Class

- Section 2.2.3 (b) is updated as below:

Staff Grade	Seating Class	
	Train / Rail	Ferry
<ul style="list-style-type: none">- Provost- Vice-Presidents- Chief Innovation Officer- Associate Vice-Presidents- Deans <u>and one level down from the Deans</u> of Faculties and Schools- Heads of administrative offices at Band "I" or "H"	Premium economy class (Ordinary/Standard class is encouraged)	First/Deluxe class (Ordinary/Standard class is encouraged)

The Business Travel Policy is enclosed for your reference.

If you have any questions, please contact Mr. Jeff Yuen at ext. 5077.



Adonis Lee
Encl.

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HONG KONG BAPTIST UNIVERSITY

Business Travel Policy

Document control

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Prepared by	<p>Adonis Lee</p> <p><small>Digitally signed by Adonis Lee Date: 2025.04.17 11:35:37 +08'00'</small></p> <hr/> <p>Mr. Adonis Lee Director of Finance</p>
Approved by	<p></p> <hr/> <p>Ms. Christine Chow Vice-President (Administration) and Secretary</p>

Record of Changes

Modifications and/or revisions to the policy are recorded in the table below.

Revision date	Version number	Description and location of change(s)	Updated by
October 2020	1.0	Initial issue	Finance Office (Accounting & Budgeting Section)
May 2024	1.1	<ul style="list-style-type: none">- Update 1.1, 1.2- Add 2.1, 2.2- Add 3.1, 3.2, 3.4- Add 4.1- Update 4.2- Add 4.3- Update 4.4- Update 5.1, 5.2- Update 5.3, 5.4, 5.5, 5.6- Add 6.1, 6.2- Add 7.1- Update 8.1, 8.2- Add 8.3- Update 9.1, 9.2, 9.3- Add 10.1	Finance Office (Accounting & Budgeting Section)
December 2024	1.2	All sections	Finance Office (Special Project Section)
April	1.3	- Update 2.2.3	Finance Office (Special Project Section)

Distribution Record

The latest version of the approved policy will be uploaded to the Finance Office Homepage > For Staff > Information > Financial Policies and Procedures > ***Business Travel Policy***

Table of Contents

1	Scope and General Principles	5
2	Overnight Business Travel and Day Travel with Air	5
3	Same-day Non-local Ground Travel	8
4	Local Transportation Expenses in Hong Kong	9
5	Personal Travel	9

Business Travel Policy

1 Scope and General Principles

- 1.1 This Policy applies to all University staff members who engage in University business or related travel, on behalf of the University, whether in domestic or international locations. University-related travel arrangements made for non-employees should also adhere to these principles. For details regarding disbursement to non-local speakers or visitors, please refer to the [*Guidelines on reimbursement of expenses to non-local speakers or visitors*](#).
- 1.2 All business and travel expenses must have a valid business purpose that aligns with the University's mission. The University pays directly or reimburses individuals for such expenses that are deemed necessary and appropriate, covering all sources of University funds.

2 Overnight Business Travel and Day Travel with Air

2.1 Pre-Trip Approval

- 2.1.1 Staff members planning to engage in overnight business or related travel, as well as day travel that includes airfare, must obtain pre-approval before making any travel arrangements.
- 2.1.2 To facilitate the approval process, staff members are required to submit the [*Business Travel Pre-Trip Approval Form*](#) which should include the following information:
- a) Details of the proposed trip, including the purpose and duration of travel
 - b) Declaration of reimbursement basis, please refer to Section 2.6.1
 - c) Estimated costs
 - d) The funding source from which the expenses will be covered
- 2.1.3 The pre-trip approval should be sought based on the following:

Staff Grade	Approving Authority
a) Provost/Vice-Presidents/Chief Innovation Officer/Associate Vice-Presidents/Deans/Heads	One-level up respectively
b) All staff members [except (a) above]	Head of respective Department/ Academy/Faculty/School/Office

- 2.1.4 The approval process is subject to the discretion of the respective approving authority and is contingent upon the availability of funds.
- 2.1.5 Along with the pre-trip approval form, staff members shall apply for duty/conference leave or assigned duty outside Hong Kong, where appropriate, via [BUniPort](#) or HKBU Mobile App. Please refer to the Human Resources [website](#) for more information.

2.2 Travel Class Entitlement

- 2.2.1 The travel class entitlement is applicable to overseas return travel originating from Hong Kong and extends to connecting transportation for trips involving multiple business destinations, i.e., traveling between cities or nations within the same trip.

2.2.2 Flight Class

Staff members traveling by air are entitled to travel in economy class, premium economy, or business class, depending on the estimated duration of the flight and their staff grade. The entitlement of flight class is summarised in the following table:

Staff Grade	Flight Class	
	Flight Time < 9 Hours	Flight Time ≥ 9 Hours
a) - President and Vice-Chancellor - Council Chairman, Vice Chairman and Treasurer	Business class (Premium economy class is encouraged)	Business class (Premium economy class is encouraged)
b) - Provost - Vice-Presidents - Chief Innovation Officer	Premium economy class (Economy class is encouraged)	Business class (Premium economy class is encouraged)
c) - Associate Vice-Presidents - Deans of Faculties and Schools - Heads of administrative offices at Band “I”	Economy class	Premium economy class (Economy class is encouraged)
d) All staff members [except (a), (b) and (c) above]	Economy class	Economy class

2.2.3 Train/Rail/Ferry Seating Class

Staff members traveling by train, rail, or ferry are entitled to the below seating class based on their staff grade:

Staff Grade	Seating Class	
	Train / Rail	Ferry
a) - President and Vice-Chancellor - Council Chairman, Vice Chairman and Treasurer	Business class (Premium economy class is encouraged)	First/Deluxe class (Ordinary/Standard class is encouraged)
b) - Provost - Vice-Presidents - Chief Innovation Officer - Associate Vice-Presidents - Deans and one level down from the Deans of Faculties and Schools - Heads of administrative offices at Band “I” or “H”	Premium economy class (Ordinary/Standard class is encouraged)	
c) All staff members [except (a) and (b) above]	Ordinary/Standard class	Ordinary/Standard class

2.2.4 Class upgrade

Class upgrades using University funds will not be entertained unless under exceptional circumstances. The request should be supported by strong justifications, which may include

documented medical needs or other compelling reasons. Staff members must obtain approval from the appropriate higher authority and declare the request as an exceptional item when submitting the pre-approval form. Upon proper approval, the additional cost for the upgrade can only be supported by non-UGC funds. The Finance Office is required to submit an annual report to update the University Administration on the exceptional approvals granted throughout the year.

Staff Grade	Approving Authority
a) Provost/Vice-Presidents/Chief Innovation Officer/Associate Vice-Presidents/Deans/Heads	One-level up respectively
b) All staff members [except (a) above]	<u>One-level class upgrade</u> Head of Administrative Office/Dean of Faculty/School <u>More than a one-level class upgrade</u> Provost/Vice Presidents/Chief Innovation Officer

2.3 Travel Insurance

- 2.3.1 The University has implemented a group travel insurance policy that covers all staff members during overseas business trips. The insurance coverage is valid for trips up to 185 days in duration. If a business trip exceeds 185 days, staff members must contact the Finance Office to arrange for an extension of the insurance coverage prior to their departure.
- 2.3.2 Additional information regarding insurance matters can be found on the [website of the Finance Office](#). Staff members are required to keep records of their business trips to provide evidence upon request by the underwriter in the event of a claim.

2.4 Booking Travel

- 2.4.1 Staff members can make their travel arrangements, including tickets bookings and lodging reservations, through the University-appointed travel agents or book directly with the airline, hotel, and/or service provider, or utilizing other platforms.
- 2.4.2 The University has put in place the [Guidelines for Procurement of Travel Services](#) that govern the procurement process for passenger tickets and lodging.

2.5 Taxi and Ride-hailing Services

- 2.5.1 The use of taxi and ride-hailing services, such as Uber, Lyft, Grab, Didi, are generally allowed for business travel, provided that the service is legally permitted in the local jurisdiction in which it operates and can be justified for business purposes.

2.6 Reimbursement of Travel Expenses

- 2.6.1 Reimbursement of business travel expenses can be claimed through a daily subsistence allowance, which is capped at the rate of Overseas Daily Subsistence Allowance (“ODSA”). Claiming actual costs is permitted only under special circumstances and staff members have to submit their request as an exceptional item when seeking pre-trip approval.

- 2.6.2 Staff members who engage in business travel outside of Hong Kong are eligible for the ODSA. The ODSA should not be regarded as an entitlement for staff members and its granting is subject to the availability of funds and the discretion of Budget Controllers.
- 2.6.3 The rates for the ODSA are determined based on the Subsistence Allowances announced by The Government of the Hong Kong Special Administrative Region, and they can be found on the [website of the Finance Office](#). However, the Director of Finance holds the authority to revise the rates of the ODSA periodically, with reference to the Civil Service Regulations.
- 2.6.4 The ODSA is payable starting from the night following the staff members' arrival at the first place of duty and continues until the night before their departure from the last place of duty.
- 2.6.5 Staff members can claim ODSA to cover various expenses, including:
- hotel accommodation;
 - meals;
 - laundry charges;
 - local travel expenses;
 - minor incidental out-of-pocket expenses; and
 - applicable tax incurred from (a) – (e).
- 2.6.6 Reimbursement applications can be submitted through i-Expense in the Oracle system, following the below guidelines:
- Submit a copy of the approved Pre-Trip Approval Form.
 - Submit proof of their stay overseas, which includes airline tickets and boarding passes
 - Submit claims within 180 calendar days from the date of corresponding receipts or invoices. Claims submitted after this period will not be accepted.
 - For claims based on actual costs incurred, staff members shall attach electronic copies of receipts or invoices to i-Expense. Original receipts or invoices are not required to be submitted to the Finance Office unless the claim is selected for a sample check.
 - Staff members are responsible for obtaining approval from the original approver before submission if the claimed amount exceeds the pre-approved budget.

3 Same-day Non-local Ground Travel (e.g. Mainland China / Macau)

- 3.1 Same-day non-local ground travel does not require the completion of the Pre-Trip Approval Form, as outlined in Section 2.1.2. However, approval for the trip must be obtained in advance via email or memo with the following information from the relevant Approving Authority, as stated in Section 2.1.3.

Staff Name:	
Position:	
Faculty / School / Administrative Office / Department:	
Date of the non-local day trip:	
Trip Destination:	
Trip Purpose:	
Budget within \$2,500 (Yes / No. If No, please specify the amount and the reason behind):	

- 3.2 Staff members shall apply for duty/conference leave or assigned duty outside Hong Kong, where appropriate, via [BUniPort](#) or HKBU Mobile App to facilitate the calculation of work

compensation and manage staff members' Individual Income Tax exposure in China. Please refer to the Human Resources [website](#) for more information.

- 3.3 Business travel expenses shall be claimed based on actual costs by submitting through i-Expense in the Oracle system. Staff members must attach electronic copies of receipts or invoices to i-Expense. Original receipts or invoices are not required to be submitted to the Finance Office unless the claim is selected for a sample check.
- 3.4 Staff members must ensure all claims are submitted within 180 calendar days from the date of corresponding receipts or invoices. Staff members are responsible for obtaining approval from the original approver before submission if the claimed amount exceeds \$2,500 or the pre-approved budget (if applicable).

4 Local Transportation Expenses in Hong Kong

- 4.1 The Heads of Departments/Offices/Budget Controllers are authorised to approve the fares incurred by staff members using taxis or any other means of transportation for business purposes within Hong Kong. This includes travel to and from the airport, train stations and other public transportation terminals when staff members are departing for and returning from overseas business trips.
- 4.2 The Head of Departments/Offices/Budget Controllers also have the discretion to approve reimbursement of taxi fare for staff members who are returning home after working overtime or when the morning schedule necessitates an early departure, on the condition that the respective approving authority is satisfied that the staff members have used the most appropriate route and mode of transport, considering the special circumstances of the case and prioritizing the interests of the University and the safety of the staff members.
- 4.3 Ride-hailing expenses, such as Uber or Didi, are typically not eligible for reimbursement, except for "Uber Taxi" fares.
- 4.4 Staff members are required to submit a local travel expenses claim with valid receipts or invoices for the reimbursement via i-Expense in the Oracle system.

5 Personal Travel

- 5.1 In the event that staff members plan to combine personal travel with a business trip, they are required to provide details of their personal travel when submitting their pre-trip approval.
- 5.2 Staff members are responsible for covering the costs associated with their personal travel, including but not limited to any additional expenses incurred for personal reasons and the excess costs for indirect routes. The University will not reimburse or pay for these personal expenses.
- 5.3 In cases where staff members need to adjust the route, lodging, and/or dates of travel due to combining business and personal travel, they must provide a comparison quote (i.e., the quote for business travel only versus the quote for business and personal travel) for the relevant costs. Staff members will only be eligible to reimburse the lower cost of the two.
- 5.4 Alternatively, if staff members request an ODSA, the subsistence allowance will only cover the business travel period and will not extend to the duration of personal travel.