

HUMAN RESOURCES POLICIES AND PROCEDURES/PASSAGE & BAGGAGE

PASSAGE AND BAGGAGE (PROVISION OF BENEFIT IN KIND) ARRANGEMENT

PASSAGE ARRANGEMENT

1. "Standard Passages" shall be provided to the following staff members appointed before 1 January 2002:
 - a. an appointee recruited from outside Hong Kong and his/her family on first appointment and final departure on leaving the service of the University upon completion of a fixed-term employment;
 - b. a staff member and his/her dependent family members whose salary is at or above the first point of the Government Directorate pay scale once every two years or as specified in his/her terms of appointment;
 - c. a staff member appointed on overseas terms (before the Common Terms of Employment coming into effect) and his/her dependent family members on satisfactory completion of a tour of service and on final departure.
2. "Standard Passage" means
 - a. a direct single-journey economy class flight to Hong Kong on first appointment for appointees referred to in par. 1(a) above;
 - b. a return economy class flight between Hong Kong and the United Kingdom for staff members referred to in par. 1(b) above;
 - c. a return economy class flight between Hong Kong and the declared place of permanent home for staff members referred to in par. 1(c) above; and
 - d. a direct single-journey economy class flight from Hong Kong to the declared place of permanent home for staff members referred to in pars. 1(a) and (c) above on final departure.
3. A tour of service for the purpose of the provision of passage is normally 24 months, inclusive of paid leave, unless otherwise stipulated in the Letter of Appointment.
4. Standard Passage is provided to the staff member, his/her spouse and up to four of his/her dependent children.
5. For staff members referred to in pars. 1(b) and (c) above, if in the course of the staff member's contract / tour of service as appropriate, a child ceases to be dependent on him/her within the provisions of this contract/tour of service on account of (a) reaching the age of 21 years, or (b) who although aged 19 or 20 years ceases full-time education or full-time vocational training, or (c) who marries, whichever is earlier, the child's eligibility for a standard passage will be determined on a pro-rata basis. The part payable will be that proportion of the period calculated from the date of commencement of the contract or tour of service as appropriate up to and including the day preceding the cessation of eligibility, which it bears to the entirety of the contract or tour of service as appropriate, notwithstanding that the child may have departed on the journey from Hong Kong before ceasing to be a dependent child.
6. Claims for reimbursement for first appointment passage should be sent to Finance Office within the first 3 months after commencement of appointment. Dependent family members accompanying the staff to stay in Hong Kong must also come within the first 3 months should they wish to claim the allowance for the outward passages.
7. If a staff member referred to in par. 1(a) above fails to take up the appointment; OR resigns before completing the period of service to which he/she has been contracted, he/she shall be required to refund to the University such proportion of the cost of the outward passage(s) and baggage allowance to Hong Kong as the uncompleted portion of the period of service relates to the full

period of service. If he/she resigns before completing the contracted period of service, or is granted a substantive appointment, no final departure passage shall be provided.

8. An eligible staff wishing to claim passage should complete the relevant form obtainable from the Human Resources Office. Staff members referred to in pars. 1(b) and (c) above may apply to join the Split Passage Scheme.

SPLIT PASSAGE SCHEME

9. Procedural Arrangement

- a. The Finance Office will prepare a quoted price list of single trip and return airfares twice every year (i.e. February and August of the year) between Hong Kong and the following broad area zones:

Australia / New Zealand
Continental Europe
United Kingdom
Guangzhou
Shanghai
Beijing
Philippines / Taiwan
Indonesia / Japan
Singapore / Malaysia / Thailand
Hawaii
East Coast of North America
West Coast of North America

(Quoted price of single/return airfares for destinations other than the above zones will be provided by the Finance Office upon request.)

- b. Once a staff member elects to advance and split his/her passage entitlement after a completion of at least six months' service within a tour of service, a "passage allowance" in accordance with the quoted price list provided by the Finance Office will be set as the staff member's maximum entitlement within that particular tour of service. This "passage allowance" will be set in accordance with the approval date of passage arrangement given by the Human Resources Office before the travel and the prevailing quoted airfare at that time by the Finance Office. This allowance will not be affected by subsequent revision in the quoted price list of airfares.
- c. **The "passage allowance" for each tour can be divided into not more than two parts which are to be used towards the costs of two sets of passages.** Hence, a staff member will be allowed to make a maximum of two claims for payment to meet the cost of the two sets of passages.
- d. Savings from the "passage allowance" of a tour of service cannot be carried forward to the next tour.
- e. In planning leave passages, staff members should ensure that prior approval for leave has been obtained.
- f. Bookings for all leave passages under the Scheme should be made directly with the travel agents by the staff concerned. Following from that, a staff member should file an application with the Human Resources Office. The duly certified Application Form should then be presented to the Finance Office for settlement of the leave passages expenses by either one of the following ways :
 - i Direct Payment - obtain a cheque payable to the travel agent by presenting the invoice, in which case any subsequent alterations cannot be entertained; and in the event that travel arrangements are cancelled and the University has already made out a cheque payable to

the travel agent, all refunds will then be made to the University and the refund will be credited, where appropriate, to the staff member's passage balance; OR

- ii Reimbursement - make all payment first and then present the receipt with ticket stubs / counterfoils / boarding pass for reimbursement after the travel.

10. Routings

The Finance Office will not exercise any control over routings under this Scheme.

11. Coverage of Travel-Related Expenses

- a. The "passage allowance" will cover the following travel related expenses provided that the claims for which can be supported by receipts:
 - i. Airfare;
 - ii. Other surface travelling expenses - such as rail or ferry fare, and car mileage;
 - iii. Package Tours;
 - iv. Accommodation;
 - v. Meals and refreshments during the tour;
 - vi. Facilities provided by the rented accommodation such as telephone, laundry, fitness and recreational facilities expenses;
 - vii. Entertainment performance (e.g. concert, opera, movie, circus) provided during the tour;
 - viii. Car-hire Charges - including the insurance premium, costs of fuel and extra items (e.g. baby seats, roof-racks, etc.) associated with car-hire;
 - ix. Airport Departure Tax.

Relaxation of coverage extended to items 11a(v), (vi) & (vii) took effect from 1 February 2002.

- b. Common expenses incurred for the passage i.e. expenses which are incurred for more than one person, e.g. hotel charges for a double/triple room or car-hire expenses for the whole family, may be debited in any proportion to the passage accounts of those family members travelling together.
- c. The "passage allowance" will not cover the following expenses :
 - i. Travel insurance;
 - ii. Deposit or penalties required by the airlines or travel agents due to cancellation or change of itinerary.

12. Claim Procedures

Staff members will need to submit itemized original receipts for major items only, including airfares, accommodation and package tours. Staff members are however advised to retain the receipts for other items for six months from the date of claims and to produce them if necessary upon request from the Finance Office. Failure to produce receipts as required result in the portion of allowance paid to staff relating to the items concerned to be recovered.

13. Unaccompanied Air Baggage

For staff appointed on overseas terms of appointment, baggage allowance will only be payable in the claim for payment to settle the last sets of passage within that tour of service. Savings from the baggage allowance of a tour of service cannot be carried forward to the next tour.

14. Arrangements when Leaving the University Service

- a. When a staff member referred to in par. 1 (b) above leaves the University service, his/her entitlement for the passage benefit from Hong Kong to United Kingdom will be calculated on a pro-rata basis up to and including the end date of his appointment in relation to a tour of service of two years.
- b. Staff members referred to in par. 1 (a) above are only entitled to standard direct passages from Hong Kong back to their residing country at time of recruitment, only upon satisfactory completion of a fixed-term contract.
- c. Staff members referred to in par. 1 (c) above who resigns before completing a tour of service shall be provided with homeward passage & baggage allowances on a pro-rata basis.

Hence, all passages taken by staff members as described in pars. 14 (a) and 14 (c) above during the tour are advances against unearned passage entitlements and all costs borne by the University in respect of such passages must be recognized as such. Staff members will be required to repay any advances to the University if the tour has not been completed satisfactorily or the advances claimed are in excess of entitlement.

Baggage arrangement

15. In addition to any free baggage allowance granted by the carrying airline, eligible staff members on first appointment and staff members on overseas terms claiming passage on completion of contract / a tour of service will be reimbursed the actual baggage costs for the transportation of personal effects (either by air or by sea) subject to the maximum claimable baggage allowance (air and sea as stipulated in the appointment letter and/or Terms of Service) to which he/she is entitled.
16. Upon the presentation of original payment receipts to the Finance Office, the appointee can claim reimbursement for his/her baggage allowance within a period of **three months** after commencement of duty. For shipment of books a receipt stating the volume and the charge rates will be required. The exact amount for baggage allowance payable to eligible appointees will be determined by the Finance Office after relevant invoices and payment receipts are submitted by the appointees.
17. For staff members who opt for the Split Passage Scheme, no baggage allowance will be payable for the passages taken in advance of entitlement.
18. On final departure, an eligible staff member will be provided with baggage allowance for the transportation of personal effects by sea and air subject to the maximum allowance as stipulated in his/her letter of appointment/terms of service. The staff member should submit his/her claim by completing an appropriate application form which is obtainable from the Human Resources Office. He/she shall obtain three quotations from any of the nominated forwarding agents of the University for the shipment of personal effects back to the place of permanent home specified in his/her appointment contract.
19. The staff member should forward the completed application forms duly certified by Human Resources Office on the volume and weight entitlement and three forwarders' quotations to the Finance Office for acceptance. The Finance Office will inform the staff member which quotation is acceptable by the University for reimbursement purposes. Under no circumstances will an staff member be allowed to claim allowance for forwarding his/her baggage to more than one destination.
20. All forwarding charges are to be paid in the first instance by the staff member. All claims for reimbursement must be made no later than three months after the closing date of the staff

member's contract with the University. Reimbursements will normally be made ten working days after the staff member presents the official invoices and receipts to the Finance Office.

Human Resources Office
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