SOUTH AFRICAN MEDICAL

ASSOCIATION TRADE UNION

TRAVEL AND SUBSISTENCE POLICY
&
INTERNATIONAL TRAVEL POLICY

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1. INTRODUCTION

The purpose of this policy overview:

1.1 It is essential for representatives of the Trade Union to travel to cities, towns and other Countries in order to establish and maintain links and relationships with members, other trade unions, government bodies, stakeholders, bargaining councils, and other parties, institutions and organizations operating in or interacting in the sphere of trade unions and employers.

1.2 To regulate how travelling and subsistence costs are paid to staff members and other incorporated personnel required to undertake approved SAMATU business which involves incurring expenses for travel, lodging, meal and other costs for attending conferences, meetings, seminars, training and conducting other SAMATU business.

1.3 This policy sets out the basis for the payment of a subsistence and travel allowance for the purpose of such official travelling.

1.4 The Travelling and Subsistence allowance policy needs to be updated from time to time in order to ensure that prevailing economic circumstances such as fuel prices, interest rates and cost of living are accounted for in the payment of allowances. It is also necessary that the policy be tailored to suit the operational requirements of the Trade Union.

1.5 Furthermore, to provide a reference to other SAMATU policies that are relevant, in whole or in part, to address travelling and subsistence requirements.

2. SCOPE

2.1 This policy applies to SAMATU members and all SAMATU employees, including Trade Union officials, elected leaders and any other person or appointee who is entitled to such allowances based on pre-approved work to be done for and on behalf of SAMATU.

2.2 This policy applies to both International Travel and Domestic Travel arrangements for representatives.

3. ROLES & RESPONSIBILITIES

3.1 The General Secretary/Provincial Secretary has the responsibility to ensure compliance with this policy and the discretion to define the processes, procedures, and other mechanisms by which the policy is implemented within SAMATU.

3.2 It is the responsibility of the General Secretary to ensure that all procedures are implemented in accordance with this policy.

3.3 All travel approvals must be in writing and signed by the General Secretary prior to departure. In cases where obtaining verbal authorization from the General Secretary, it is the responsibility of the Traveller to have the authorisation ratified by the General Secretary within 72 hours from obtaining the verbal authorisation.

4. PRINCIPLES

When considering a policy for the reimbursement of travelling and subsistence costs to employees the following must apply:

4.1 direct and measurable cost;

4.2 statutory compliance;

4.3 affordability within the predetermined annual budget.

5. DEFINITIONS

5.1 "**Accommodation**" means the rental of lodging facilities while away from one's place of abode, but on authorised official duty on behalf of SAMATU.

5.2 "**After Hours- Reservations**" means a travel request that is actioned after normal working hours, i.e. 17h00 to 8h00 on Mondays to Fridays and twenty-four (24) hours on weekends and public holidays.

5.3 "**Air Travel**" means travel by airline on authorised official duty on behalf of SAMATU.

5.4 "**Car Rental**" means the rental of a vehicle for a defined period of time by a Traveller for official business purposes on behalf of SAMATU.

5.5 "**Domestic Travel**" means travel within the borders of the Republic of South Africa or within the borders of the foreign country where the Official is based.

5.6 **Day** is calculated as a single 24-hour period, which commences at time of departure from the normal workplace.

5.7 “**Emergency**” means an event where unforeseen and unavoidable circumstances, including but not limited to, a death, illness, health risk or a business environmental risk, requires a booking for travel or a diversion from the original planned trip.

5.8 “**International Travel**” means travel outside the borders of the Republic of South Africa or outside the borders of the foreign country where the Official is based.

5.9 “**Official Business**” means performing the organisation’s functions in terms of their mandate and strategic, operational and performance plans.

5.10 **“Place of Duty**” means the place, other than the Place of Work, where the Official performs official business or is otherwise on duty, e.g. an external meeting venue, conference venue or workshop.

5.11 “**Place of work**” means the place of work identified in the Official’s contract of employment or as may be designated by the employer, from time to time.

5.12 **Preferred rates**: rates charged by hotels and car hire to SAMATU which are lower than the normal rates charged, and which rates have been negotiated through the Media and Marketing department.

5.13 “**Shuttle Service**” means the service offered to transport a Traveller from one point to another and includes taxi services.

5.14 ‘**Subsistence Allowance**” means the money paid to a Traveller travelling on Official Business to cover cost of travel, meals, and other associated expenses.

5.15 **“Subsistence and travel allowance** is an amount payable by the Trade Union to an employee or representative compliant with the statutory requirements.

5.16 "**Traveller**" means a person travelling at the behest of the Institution on Official Business.

5.17 "**Travel Advance**" means the funds advanced to an Official or Traveller prior to embarking on an official trip.

5.18 "**Travel Authorisation Form**" means the official form utilised by the Institution reflecting the detail and order number or unique authority number of the trip that the relevant Authorising Official approves.

5.19 "**Travel Booker**" means the person coordinating travel reservations with the TMC consultant on behalf of the Traveller.

5.20 "**Travel Expenses**" means expenses incurred by a Traveller while he/she is on an Official Business trip. Examples of Travel Expenses may include money spent on lodging, transportation and meals.

5.21 **Travel kilometres** reimbursed for the use of a private vehicle will exclude kilometres travelled from residence to the normal workplace.

5.22 "**Representative**" means a SAMATU official, SAMATU Office Bearer, SAMATU Task Team member, SAMATU Provincial Co-ordinator, SAMATU Shop Steward, Other persons specifically authorized to represent the Trade Union on a particular occasion, any official who is a member of a recognized professional institution and is granted permission to attend meetings and conferences of such institution, any other person who is granted permission to attend meetings, conferences and any other official engagement authorized by the Trade Union leadership.

6. GENERAL PRINCIPLES

6.1 SAMATU allow the Traveller to make travel arrangements that is in line with the provisions of the Trade Union's Travel Policy.

6.2 Travellers must ensure that they compare various airline fares, Accommodation establishment rates and Car Rental rates before confirming a booking, maintaining the principles of competitiveness and cost effectiveness in supporting the Institution's sustainability.

6.3 Each Traveller must exercise good and ethical judgement when incurring Travel Expenses.

6.4 The General Secretary/Provincial Secretary must consider, prior to approving travel requests, the necessity to travel, limited to the absolute critical trips in support of the organisation's mandate.

6.5 Each Traveller conducts business in a manner that excludes considerations of personal advantage while complying with all applicable policies.

6.6 Compliance with the organisation' travel policy is the responsibility of all Officials, Travellers, and any other person involved with travel related matters.

6.7 Each Traveller must safeguard SAMATU's information and assets while travelling on Official Business and must avoid compromising on that security.

6.8 Each Traveller must maintain, for official Business purposes, the validity of necessary personal travel documents such as a passport, visa, international driver's licence, etc. The Traveller may claim any justifiable costs of doing so from the organisation where the General Secretary provides prior approval.

6.9 Representatives must limit International Travel to critical trips and limit the number of the delegation to Travellers directly involved in the subject matter of the meeting or event.

6.10 All requests for International Travel must include the following, a motivation for the visit, especially its benefit for SAMATU, the financial implications of the trip, and the support delegation, including the roles of each Official.

6.11 Before a Traveller departs to an international destination, he or she is responsible for obtaining, information relating to what is the most appropriate method of payment for Accommodation and services, e.g. cash, virtual cards, cash cards, daily allowance advance or foreign debit cards. What is the most practical currency, Consult a travel clinic well in advance where inoculation is required, take cognisance of the political and security situation in the country and confirm the applicable business etiquette.

7. AUTHORIZATION

7.1 Travellers are not allowed to approve their own travel requests and travel expenditure.

7.2 All journeys, travel and accommodation must be pre-authorized in the prescribed format prior to embarkment. All requests for authorization will be prepared by the designated department within SAMATU and approved by the General Secretary.

7.3 An *invitation* to attend a workshop, meeting or related event is not an automatic authorization to attend such workshop or event. Prior required authorization must still be obtained from the General Secretary in the prescribed format.

7.4 If any representative fails to do so, or leave the event before its conclusion, the General Secretary may recover all allowances and disbursements paid to such delegate or attendee.

7.5 Travelling and subsistence will not be paid in cases where it is being paid for by the host or person who extended the invitation.

7.6 The representatives must abide with the report back time limits (48 hours) in terms of submission of a report when attending official business of SAMATU.

7.7 The processing of Subsistence and Travelling claims will be dealt with by the delegated official within the offices of the Trade Union.

7.8 NOB to consider all international travels.

8. RESPONSIBILITIES OF REPRESENTATIVES

8.1. Every representative who travels on the business of the Trade Union must comply with this policy.

8.2 Representatives who travel on business of the Trade Union must appreciate, at all times, that they are ambassadors of the Trade Union, that their actions, conduct and statement must be in the best interest of the Trade Union. They must comply with any specific mandates and or instructions they have been given. Failure to adhere to these requirements may result in recovery and disciplinary proceedings being instituted.

8.3 Consistent with the Trade Union's performance monitoring and evaluation objectives, the General Secretary shall ensure that a database of all representatives and official travelling is kept in the normal course of business.

8.4 SAMATU delegates or representatives to any conference, workshop or meeting must ensure that they arrive on time and attend until the conclusion.

8.5 Any cost incurred due to the non-arrival of, the non-communication or negligence from a representative, will be towards the cost of the representative.

8.6 Any SAMATU funds which were appropriated for the purposes of the subsistence and travel requirements of an individual and which are not fully utilized by that individual MUST be paid back to SAMATU within 5 days of returning.

8.7 Pre-approved arrangements may be amended and or revised with the assistance of the administrative office once authorised by the General Secretary prior to departure. Failure to embark or report timeously will make the member or representative personally liable for the costs incurred.

9. ACCOMMODATION

9.1 The Trade Union will carry the cost of Accommodation for all Travellers who are travelling on official business.

9.2 All accommodation arrangements will be the responsibility of the designated department at the SAMATU administrative office.

9.3 The actual cost of accommodation to be pre-approved by the General Secretary before a booking is made.

9.3 SAMATU will compensate Travellers the Fixed Daily Subsistence Allowance rate with the prior approval pf the General Secretary.

10. SUBSISTENCE ALLOWANCE

10.1 The purpose of subsistence allowance is to reimburse any expenditure incurred relating to non-alcoholic beverages and any incidental expenditure, not included in the bed, breakfast and dinner tariff of the facility where the representative is accommodated.

10.2 Exceeding 6 hours outside SAMATU: Incidental costs in the amount equal to the determination for meals and incidental cost that are deemed to have been expended by the South African Revenue Services (R161.00 for 2023) per day.

10.4 Where a booking for accommodation is done on a dinner, bed and breakfast basis, an allowance for incidental costs in the amount equal to the determination for incidental costs that are deemed to have been expended by the South African Revenue Services (R161.00 for 2023) per day will be payable.

10.5 For the purpose of calculating the allowance, both the day of departure and the day of return shall qualify for the payment of subsistence allowance.

10.6 Delegates are to be allowed to book accommodation the night before a workshop, meeting, conference, training, symposium commence; if (i) such an event starts before 08:00 AM the next day, and/or (ii) the one-way travelling distance exceeds 200 kilometres.

10.7 If accommodation is required for the night prior to a meeting, conference, training or symposium other than stipulated in 10.6 above, the explicit approval from the General/Provincial Secretary must be obtained prior to any arrangements being made.

11. ENTERTAINMENT OF OTHER PERSONS

11.1 Entertainment of external nature falls outside the scope of the subsistence allowance and will separately be reimbursed (subject to prior approval by the General Secretary where applicable).

12. TRAVEL

12.1 ROAD TRAVEL

Whenever the designated SAMATU vehicle is not available, whereby the SAMATU representative is required to utilise his/her own vehicle, the representative will be reimbursed at the prescribed SARS rate per kilometre(R4,64) , subject to the stipulations in this policy

The Traveller must attach the kilometre calculation to the claim form setting out the expenditure claimed to verify that the kilometres claimed are reasonable. The Traveller must attach proof of a reputable map (e.g. Google maps), confirming the distances between the two locations.

Vehicle travel claims must be restricted to the actual distance travelled in excess of the normal distance from the Traveller's residence to his or her Place of Work.

Kilometers travel claims must be submitted once per month, e.g. for the period 1-31 March , the claim must be submitted by 1 April.

12.2 **AIR TRAVEL**

For travelling to and from the airport, the normal travelling policy will apply.

Travellers must plan official travel well in advance to take advantage of the cheaper economy class fares which requires bookings/reservations be made, where possible, at least seven (7) working days prior to departure. The most cost-effective options are available when making bookings/reservations more than fourteen (14) days prior to departure.

Travellers and the relevant SAMATU department must make every attempt to reduce travel costs by comparing the cost advantage of using alternative transport modes. The insurance should be covered/indicated

13. ROAD IN STEAD OF AIR TRAVEL

Where air travel is available, and the delegate wishes to travel by road the following will apply:

13.1 The designated SAMATU vehicle must be utilised for Trade Union business.

13.2 The internal vehicle policy will apply.

13.3 In the event that the designated SAMATU vehicle is not available, whereby the representative will be required to utilise his own vehicle, the representative will be reimbursed at the prescribed SARS rate per kilometre

14. VEHICLE RENTAL

14.1 All vehicle rental bookings will be done by the designated department within SAMATU.

14.2 Only one vehicle per delegate except if circumstances dictate otherwise and prior approval is granted by the General Secretary upon submission of a detailed motivation.

14.3 Small vehicle rental is applicable for short distance travelling. Where longer distances are travelled the category may be upgraded to medium vehicles with the prior approval of the General Secretary. Where more than four delegates are involved, a seven (7) or eight (8) seater minibus must be considered. Should it be more than 200km or more, consider class D

14.4 Maximum kilometer allowance of 200km per day must be included in the daily rental amount. However, if it is anticipated that the maximum daily kilometre allowed will be exceeded the prior approval by the General Secretary is required.

14.5 Prior authorization will be required on all vehicle rentals. No personnel will be allowed to rent a vehicle without prior approval. All expenses relating to non-approved rental will be for the renter's account.

14.6 The Traveller must return the vehicle within the specified rental period or notify the Car Rental Company. The Trade Union must hold the Traveller responsible for the additional charges for the late return of the vehicle.

15. DOMESTIC TRIPS LONGER THAN 24 HOURS

15.1 Allowances for official domestic trips apply when Travellers are away from their Place of Work for twenty four (24) hours or longer are recorded hourly thereafter.

15.2. The calculation of the allowance will take effect from the hour that the Traveller departs from his or her Place of Work or residence (whichever one is the latest) and will end on the hour when the Traveller arrives back at his or her Place of Work or residence (whichever is the earliest) on a pro-rata basis.

15.3. When a Traveller stays in a guest house or hotel that does not provide for meals, he or she qualifies for the Special Daily Allowance and a Meal Allowance.

15.4. If a Traveller makes use of private Accommodation while on an official business trip, the Trade Union compensates the Traveller at the Fixed Daily Subsistence Allowance, on a pro-rata basis.

15.5 Subsistence allowances claimed by the Travellers of the Trade Union are dependent on the Trade Union's Travel Policy.

15.6 If a Traveller must take an official business journey that lasts for 24 hours or longer, for each day or part of a day on the journey, he or she may claim reasonable actual expenditure on Accommodation plus an allowance.

15.7 Special daily allowance is paid to compensate for incidental expenses for which it is difficult to obtain receipts e.g. newspapers from street vendors when claiming actual expenses.

15.8 If a Traveller must take an official business journey that lasts for 24 hours or longer, for each day or part of a day on the journey, he or she, may claim the fixed daily allowance in circumstances where actual expenses are not claimed:

Breakfast

– If it is not included in the Accommodation arrangements; and, or,

– If the Traveller leaves his or her residence or Place of Work before 06h00.

Lunch

– Lunch may only be claimed if it is not provided by the host.

Dinner

– If it is not included in the Accommodation arrangements; and, or,

– If the Traveller returns to his or her residence or Place of Work after 20h00.

15.9 The Traveller must have receipts for meals must be kept and must be attached to the claim form. In cases where receipts are lost, the Traveller must submit an affidavit. The claim can only be processed once approval has been obtained from the General Secretary

15.10 The Trade Union do not reimburse Travellers for any consumable items taken from mini bars in an Accommodation establishment.

15.11 Travellers cannot claim subsistence allowance for meals if the rate of the Accommodation establishment already includes dinner and, or, breakfast or if the host provides lunch, or if the conference fee includes lunch and, or, dinner.

15.2. Domestic Trips Less than 24 Hours

15.2.1. When an official business trip is less than 24 hours, the Traveller will qualify for a meal allowance in cases where meals are not provided by the host, under the following conditions:

15.2.2. Where the Traveller leaves his or her Place of Work or residence before 06h00 and only returns to his or her Place of Work or residence after 20h00.

a. The total duration of the trip is 8 hours or more;

b. The total duration of the trip is more than 4 hours but fewer than 8 hours.

15.2.3 The Traveller must submit proof of the expenditure and must have the claim approved by the General Secretary.

15.3. International Trips

15.3.1. For International Travel, the different allowance rates for the different destination countries shall be considered by the NOB.

15.3.2. The foreign daily allowance of the country of destination must be utilized to calculate the allowance.

15.3.3. Allowances for International Travel must be calculated where the Traveller is away from his or her Place of Work for twenty-four (24) hours or longer, and hourly thereafter. The calculation of the allowance shall take effect three (3) hours before flight departure and shall end three (3) hours after the return flight has landed.

15.3.4 If the Traveler travels from the country of destination to another country, the foreign daily allowance of the next country of destination is payable from the time that the Traveler departs from the first country of destination, up to when the Traveler departs from the next country of destination.

15.3.5. When Traveler returns to South Africa from abroad, a South African daily allowance (equal to the amount in respect of meals as well as incidental expenditure), will be payable to the Traveler, from his or her departure out of the last country of destination up to the reasonable time of arrival at his or her Place of Work or residence.

15.3.6 If a flight to the country of destination is not a direct flight and the Traveler will have to spend a period of time in transit in a country other than the country of destination, the foreign daily allowance applicable to the country of destination, is payable to the Traveler.

15.3.7 The purpose of the foreign daily allowance is to reimburse a Traveler for expenditure in respect of meals and incidental expenditure.

15.3.8 When expenditure on Accommodation is wholly covered by Trade Union, the Traveller is compensated on the following basis:

- The reasonable actual expenses in respect of the said accommodation.

16. INSURANCE

16.1 **Official Transport**

16.1.1. An accident with official transport must be reported to the General Secretary and the Facilities Section. Accidents must be immediately investigated.

16.1.2. The investigation report shall determine the course of action that will follow.

16.2 **Private Transport**

16.2.1 Accidents with private transport will be covered by the owner of the vehicle. SAMATU will not be responsible for any liability whatsoever thereof.

17. TRANSPORT OF PRIVATE PERSONS

17.1. The use of Trade Union vehicles for transporting private persons is strictly prohibited.

18. TRAFFIC FINES

18.1 The driver of the official and/or rented vehicle - at the time of an offence - is responsible for the payment of the fine.

18.2 The costs of such fine as well as all the related admin fees will be recovered from the driver (employee) through salary deductions without prior consultation.

19. TELECOMMUNICATION COST

Any such cost incurred for official Trade Union business will be paid to the representatives on a reimbursable basis upon submission of documentary proof to the General Secretary.

20. REVIEW OF POLICY

This Subsistence and Travel Policy is the sole governing policy and will be reviewed by the FINCOM committee to amend structural and financial revisions.

21. CONSEQUENCE MANAGEMENT

Non-compliance with this policy may lead to;

21.1 Disciplinary action

21.2 Legal action

22. Annexures:

22.1. Acknowledgement of Understanding: Annexure A

22.2. Travel Claim Form : Annexure B

22.1. Annexure A

ACKNOWLEDGEMENT OF UNDERSTANDING

I, ____ (full name & surname),

With ID no. ___________________________ and Employee no. ______________

hereby certify that I take note and understand the contents of the above SAMATU Travel and Subsistence Allowance Policy.

I am fully aware that failing to comply with policy requirements is a transgression of the Trade Union's policies, which will result in disciplinary action being taken against me.

Signed at SAMATU Pretoria on ______/______/______ (date) at _____:_____ (time)

_________________________ _________________________

Signature of Compliance Officer **Signature of Employee**

22.2. Annexure B

TRAVEL CLAIM FORM

Name of Traveller:

Date:

Narration:	
Kms Travelled:	**Amount in Rands:**
Date:	**Matter**
Traveller's Signature:	**SG's Signature:**

TRAVEL CLAIM FORM

Narration:	
Kms Travelled:	**Amount in Rands:**
Date:	**Matter**
Traveller's Signature:	**SG's Signature:**

TRAVEL CLAIM FORM

Narration:	
Kms Travelled:	**Amount in Rands:**
Date:	**Matter #**
Traveller's Signature:	**SG's Signature:**

CONTROLLED BY: COMPLIANCE OFFICER	APPROVED BY: GENERAL SECRETARY
SIGNATURE:	SIGNATURE:
DATE: 2024/02/19	DATE: 19-02-2024

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