

Travel Regulations at Karolinska Institutet

Applicable from 01-07-2010

Supersedes the travel regulations of 01-02-2008



**Karolinska
Institutet**



University Director

Revision of the travel regulations at Karolinska Institutet

Karolinska Institutet's travel regulations have been revised mainly for the purpose of establishing that KI's guidelines for the environment and sustainable development are also reflected in our travel habits. Because of this, the wording of the regulations in the appendix is new and applies from 01-07-2010.

Decisions in this matter were made by University Director, Karin Röding, based upon a report by Payroll Manager, Katarina Tillgren.

Karin Röding

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Preparation with
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Appendix: Travel Regulations at Karolinska Institutet

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Issued by:

Karolinska Institutet

University Administration, Human Resources Department

Questions regarding these regulations will be answered by the Payroll Manager

The travel regulations were approved by the University Director with effect from 01-07-2010. They replace the previous travel regulations of 01-02-2008.

1 Basic provisions

These regulations apply to employees of Karolinska Institutet (KI) and to non-employees with research funds administered by KI with whom *an agreement has been drawn up relating to the carrying on of activities at KI*.

With regard to business travel and the performance of official duties, the traveller is entitled to travel expenses, a subsistence allowance and also (in the case of travel within Sweden) a salary bonus. There is nothing to prevent the payment of a reduced subsistence allowance or none at all, provided that the employer and the traveller have agreed to this *before* the business travel starts or the traveller subsequently waives all or part of the subsistence allowance.

For further information about agreements, rules, times and payment amounts, see the references under section 10 of this document.

The regulations also apply in relation to travel expenses (including a tax-free mileage allowance) and in certain cases/any subsistence (per diem) allowance for:

- External lecturers resident in Sweden who do most of their work for KI at home
- External members and participants of boards, committees and work groups who are resident in Sweden and who do most of their work for KI at home
- External examiners and experts resident in Sweden who do most of their work for KI at home
- Test subjects who provide samples (e.g. of tissue, blood etc.¹)
- Test subjects who only receive travel expenses, i.e. when they start or finish a job No other payment may be made
- Persons accompanying test subjects
- Persons who have been called to an employment interview and have travelled between two locations in the EU Travel expenses only are payable
- Students who travel during their studies on behalf of KI
- Mentors of postgraduate students can receive an allowance for expenses after an agreement has been made in connection with an admission seminar and a half-time review Payment is not made for when presenting a doctoral thesis.

1.1 Definitions²

1.1.1 Business travel/trip

A business trip is a journey that arises when the traveller is required by KI to perform official duties elsewhere than at the place of employment.

1.1.2 Places of employment at KI

Workplaces where KI engages in permanent business on its own premises or those of another principal (e.g. Stockholm County Council).

¹ See also the Rules governing payments/grants to non-employees, doc. no. 1782/06-200

² See also the Local ALFA agreement for Karolinska Institutet

1.1.3 Place of business

An area within 50 km of the employee's place of employment and an area within 50 km of the employee's home. The distance of 50 km is calculated from the nearest travel route, regardless of whether the trip has started at the place of employment or the home.

1.1.4 Subsistence allowance (per diem)

Payment for *additional* living costs for business travel that has involved an overnight stay and has been undertaken outside the normal place of business. Claims for payment are made when creating the travel claim in the system that KI has for travel claims.

1.1.5 Salary bonus

A taxable payment made for the one-day performance of official duties and also as compensation in addition to a subsistence allowance inside Sweden in connection with official duties lasting two or more days. See the local ALFA agreement.

As with the subsistence allowance, claims for payment are made when creating the travel claim in the system that KI has for travel claims.

2 Planning and approval of business travel – a travel order

The planning of a business trip shall be done in consultation between the traveller and the employer. In order to ensure that the planned business trip is required, a travel order shall be drawn up by the traveller (this applies to employees of KI and persons with research funds administered by KI). The travel order must be approved by a senior manager.

From a safety point of view, it is not suitable for entire management teams, research teams and departments to travel together.

All planning and ordering/reservations should take place in good time prior to departure:

- so that the trip can be undertaken using the cheapest means of transport and, taking environmental impact, the amount of time and conditions into consideration, at the lowest possible total cost. Departures from this basic principle shall be justified for each trip.
- so that financiers' specific requirements on how funds should be used when travelling are properly met.

The traveller can use a designated travel agency to help with the planning of business travel.

A travel order should include a serial number. A number is generated when the travel order is created in the travel claim system. If a travel order form is used (which may be suitable if a subsistence allowance is not paid out and if there will not be any expenses), the serial number series is department-specific and should have the following format: department code, KI-ID and yy, mm, dd, e.g. UFKattil100601.

While the President, Vice President, deans, University Director and heads of department are entitled to make their own decisions about their travel, a travel order shall, nevertheless, be drawn up. These travel orders are put together in an orderly manner at each department for subsequent periodic follow-up. The follow-up is carried out by the University Administration on behalf of the University Director.

A travel order is drawn up stating all the estimated costs for the trip. The reasons for this are to reduce the number of occasions when a senior manager has to approve the costs and to give a coherent picture of each trip. This procedure also facilitates administration in the event of an insurance claim, when it is necessary to show that the trip was a required business trip. A copy of the approved travel order is archived separately and in an orderly manner at the department.

Travel order form: Available to download from the Human Resources Department's web page/Agreements and Guidelines/Travel Regulations/Travel Order.

3 Travel claim

A travel claim shall normally be drawn up in the current travel claim system as soon as possible following the return from a business trip/the performance of official duties. If the actual costs correspond with the approved travel order, the travel claim need not be approved.

A travel claim form and instructions for completing it can be found at: <http://ppw.ki.se>.

The signed and completed travel claim shall either be submitted to a certifier or to an examiner at the department. The person to whom it is submitted differs according to the administrative system at each department. The transfer of a travel claim for registration in Primula shall take place electronically.

The travel claim shall be submitted as soon as possible, although no later than three months, after returning home.

The following shall be included with the travel claim:

- Travel order
- A conference programme/list of participants or other document confirming that the trip has taken place
- A receipt for accommodation costs that have not been invoiced to KI
- Receipts for taxis or other means of transport, if the costs are to be met by KI
 - In order to make the verification of taxi journeys easier, a copy of the diary can be enclosed that includes meeting place, purpose and participants.
- Receipts for entertainment (meals) stating the purpose, together with a list of participants
- Receipts for all other out-of-pocket expenses incurred in connection with the journey for which payment is claimed.

All receipts must be **originals!**

3.1 Shared travel claim

If only part of the travel expenses are to be paid by KI, the latter will invoice the other party for part of the cost and only KI's share will be charged as an expense. In the event of a shared travel claim, this shall be stated on the travel order.

3.2 Payment via GiroVision

Payment via GiroVision may only be made to people that live abroad, where payment cannot be made via Nordea.

4 Subsistence allowances and payments of travel expenses

Deductions for meals shall be made from the subsistence allowance for *all* meals that the traveller does not pay for himself/herself. Exceptions: meals taken while travelling on public transport.

Meal benefits shall be declared for tax purposes for all meals paid for by KI. Exceptions: breakfast included in the price of a hotel room, meals taken while travelling on public transport and meals during an internal course and in connection with entertainment.

Note that even if no subsistence allowance is paid, a meal benefit shall be declared if, for example, KI has paid a conference fee, the cost of which includes meals. In these cases, a travel claim need not be drawn up. Instead, the "Benefits" form should be used and submitted to an examiner.

Travel expenses are paid, according to the produced receipt, for travel by the means of transport decided on when the request for business travel was made. No expenses are payable for a longer route than that warranted by the official duties performed. If a taxi or a hire car is used, the reason for this must be stated.

5 Choice of means of transport and orders in connection with travel

5.1 Environmental considerations

According to KI's guidelines for the environment and sustainable development, KI, as a place of study and work, must be pervaded by care for the external environment. This means that we must not least endeavour to reduce the climate impact of our business trips. This includes the choice of means of transport, the choice of hotel and that alternative forms of meetings with the help of the Internet, video and telephony should always be considered as an alternative to travelling and meeting in person.

5.2 Public transport

Local public transport should primarily be used during all business trips. However, a taxi may be a better and safer alternative in certain countries and cities.

Unless there are special reasons, public transport should be used within the city of Stockholm and the surrounding area. The KI shuttle service can be used between Solna and Huddinge, timetable permitting.

5.3 Train and plane

To the greatest extent possible, journeys less than 500 km should be made by train as opposed to by plane.

Journeys between Stockholm and Gothenburg should be made by train as opposed to by plane. Journeys by plane may only be made in special circumstances and written justification must be provided in the travel order for each trip.

Trips shall be by economy class. Tickets other than economy class tickets may only be used in special circumstances and written justification must be provided in the travel order for each trip.

For travel abroad at weekends, low-cost tickets may be used if the total cost of flights, hotel and subsistence allowance is lower than if the outward or return journey is made directly at the start or end respectively of the performance of official duties.

5.4 Taxi

If possible, taxi journeys should be made by green taxi.

5.5 Car hire

If possible, a green car should be chosen when hiring a car. In addition, the car should be equipped with an electronic stability programme and collision protection.

5.6 Own vehicle

One's own vehicle may be used for business travel in Sweden, provided that KI considers it to be the most appropriate means of transport.

The conditions for one's own vehicle being the most appropriate means of transport are that:

- heavy and bulky luggage is to be carried on behalf of KI
- two or more passengers performing official duties are travelling in the car, and/or that
- time is saved

KI pays compensation for congestion tax for business trips where one's own vehicle has been considered as the most appropriate means of transport. A receipt (in the event of a direct debit, a copy of the bank statement) shall be included with the travel claim.

If a journey is undertaken using one's own vehicle despite it not being able to be regarded as the most appropriate means of transport, the payment made will be equal to the cheapest means of transport.

The use of one's own vehicle for business travel that involves an overnight stay, solely for the reason that the journey is undertaken in one's own vehicle, shall be justified.

Special circumstances are required for the use of one's own vehicle for business travel abroad when one's own vehicle is not the most appropriate means of transport, according to KI.

If there are no special circumstances and one's own vehicle is still used, the subsistence allowance and overnight accommodation is calculated from the time of arrival at the place where official duties are to be performed. No payment is made for road, bridge and ferry tolls in these cases.

5.7 Hotel room

A hotel room shall, for short stays, be booked in a mid-range hotel located as near as possible to where the official duties are performed.

Hotels with which framework agreements have been drawn up shall be chosen if they exist as an alternative in the area where the official duties are performed and as long as they are located within a reasonable distance from where the official duties are performed.

Hotels that are eco-labelled, environmentally certified or that can prove in any other way that they conduct active environmental work shall be chosen where possible and as long as it does not contradict the above.

For longer stays, other alternatives should be used if possible, e.g. renting a small apartment.

If the traveller shares a hotel room with someone who is not entitled to expenses for board and lodging, the cost to the traveller will be 75% of the price of the double room.

Exceptions to the rules above are those cases when a hotel has already been chosen by congress and conference organisers.

6 Reservation and payment

6.1 Reservations

Reservations of tickets, hotel rooms, car hire, flights, taxis and visas etc. shall be made through KI's own framework agreements and/or state framework agreements: http://intra.ki.se/service/travels/index_se.html.

The online booking tool that exists can be used to one's own advantage as it provides a good overview of the various alternatives, including costs.

6.2 Bonuses

Bonuses, hotel cheques and any other discounts offered in the travel and hotel sector that have arisen in connection with business travel are the property of KI and may *under no circumstances* be used for private travel, but only for business travel. A list of earned and used bonus points shall be available for examination.

6.3 Charge cards and invoicing

A charge card (a company card, alternatively with a personal payment liability) should be used for business travel. See Guidelines for using charge cards.

Alternatively, tickets, accommodation, congress fees etc. are invoiced by each company. In order for payment to be made for an E-ticket purchased by the traveller, evidence that the journey has been made and its cost shall be available.

6.4 SMS tickets for public transport

It is important to keep "travel details" when using SMS as payment for public transport tickets. Travel details should include information on cost, method of payment, the time and date of the journey and means of transport (bus/train, etc.). Travel details should be enclosed with the travel claim.

6.5 Travel advances

Advance payments for travel are only paid out in exceptional circumstances. For instance, travel to a destination where a charge card cannot be used or when the journey extends over a long period. Travel advances are paid in amounts not exceeding the estimated subsistence allowance and hotel costs that cannot be invoiced and not below 400 Swedish kronor.

Travel advances are paid out via GiroVision from an account especially set up for travel advances and upon filling out a special form for travel advances. Advances may be paid up to one month before departure. Travel advances received that are not accounted for in a travel claim within three months of arriving home are deducted from the next salary payment. Alternatively, a repayment request is made.

7 Business travel insurance

KI has signed a business travel insurance agreement that is valid for business trips. However, see further on under section 8 for what applies if the trip is a posting abroad. For travel to EU/EEA countries, a European health insurance card (EU-kort) from the Social Insurance Agency shall be taken by travellers with them. This card entitles the holder to emergency public healthcare in all EU/EEA countries, with only the patient fee payable. For business travel to other countries, a *personal insurance card*, issued by the relevant department, shall be carried. *The business travel insurance conditions* shall also be taken with them by travellers so that they know what action to take on the spot in the event of an accident. Business travel insurance conditions can be found on The Legal, Financial and Administrative

Services Agency's (Kammarkollegiet) website under Insurance/Travel - <http://www.kammarkollegiet.se/>

8 Insurance for a posting abroad

A special overseas contract shall be drawn up and a URA insurance agreement signed for a posting abroad. Contact the Human Resources Department.

Read more about the URA insurance conditions on The Legal, Financial and Administrative Services Agency's (Kammarkollegiet) website under Insurance/Work abroad - <http://www.kammarkollegiet.se/>

9 Hours of work during business travel

Scheduled time at external conferences outside regular working hours is counted as working time and compensation is provided for each hour in the form of leave. Travel time outside regular working hours does not count as working time and does not qualify for compensation/payment.

10 Further information

- General Salary and Benefits Agreement (ALFA):
- <http://intra.ki.se/staff/ALFA.pdf>
- Local ALFA agreement:
http://intra.ki.se/staff/Alfa/index_se.html
- URA Agreements on overseas contracts and guidelines for conditions of employment:
<http://www.arbetsgivarverket.se/upload/Avtal-Skrifter/CentralaAvtal/ura.pdf>
- Agreements on payment etc. during business travel and the performance of official duties abroad, 2005:5:
http://www.arbetsgivarverket.se/t/PublicationDetails_366.aspx
- The Swedish Tax Agency, search words A-Ö:
<http://www.skatteverket.se/>



Serial number

Travel order

To be filled in by the traveller before the journey (see KI's Travel Regulations). The travel order shall be included with the travel claim/payment of out-of-pocket expenses.

If the actual costs correspond with the travel order, no separate authorisation is required for the travel claim/payment of out-of-pocket expenses. The traveller confirms through his or her signature the obligation to become familiar with and observe KI's travel regulations. KI/the department does not assume any salary costs or other employer's responsibility for a traveller not employed at KI unless a separate agreement has been drawn up to this effect. A copy of the travel order is to be archived separately.

Name (surname, first name(s))	
Personal identity number (xxxxxx-xxxx)	
Address	
Department	

Purpose of business trip		
Place of performance of official duties (place and country)		
Period		
Estimated cost of ticket(s)		Any comments
Estimated cost of accommodation		Any comments
Number of subsistence allowances		Any comments
Accompanying relative		
Course/conference fees		Any comments

Travel advance (amount)		Any comments
Coding (cost centre and project)		
Reasons required by the travel regulations (e.g. choice of other than the cheapest means of transport, shared costs, environment):		

Date	Approval of business travel <i>Signature of immediate manager/person responsible for authorisation</i>
<i>Signature of traveller</i>	

2010-07-12

	Name (printed)
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