**Authorizing Official Business Travel**

1. All business travel organized and paid by the organization should be approved prior to travel, and before any prepayments can be made.

1. Approval prior to the trip insures the activity is approved; funds are available for reimbursement of expenses; travel is allowable on the funds; and staff members are covered under compensation insurance.

1. **The use of virtual technology, instead of travel, as a means of communication is strongly encouraged.**

Travel should occur only when there is significant added value to the organization and our stakeholders that cannot be accomplished through conference calls, videoconferencing, or web conferencing (e-meetings). As part of the approval process for travel, managers are required to certify that there are no alternative means which are feasible to meet the objectives of the proposed travel. The approved travel request is confirmation that a staff member is authorized to travel on official duty for UNDP. It defines the entitlements and parameters of authorized travel.

1. Furthermore, senior management approval is required for delegations of two or more staff per Bureau, in a similar substantive role, to participate in UN meetings.

1. Once managers have approved the need for travel, and certified that there is no alternative means to meet the objectives of the proposed travel, the following steps will be followed:

* 1. Creation of the Travel Request (TR) and
	2. Approval of the request. Travel request creation and approval take place within UNall/Quantum.

#  Creation of the Travel request (TR)

6. The TR is a formal document to secure approval to incur travel expenses and undertake travel status. The request must be submitted for all travel performed by individuals traveling on official business organized and due to be paid by UNDP. The request is created in UNall/Quantum.

# Travel approval

1. A request to travel shall be authorized as follows:

|  |  |  |
| --- | --- | --- |
| **Location**  | **Travel by**  | **Authorized by**  |
| **Headquarters**  | General  | Head of the organizational unit funding the travel  |
| Bureau Head  | Administrator or Associate Administrator  |
| Administrator Associate Administrator  | Associate Administrator Administrator  |
| **Country Offices and other Business Units outside of New York**  | General  | Resident Representative  |
| Resident Representative  | Head of the Regional Bureau  |

1. In exceptional cases, where the staff member is orally approved to travel, and ticket issuance must occur immediately, the TR shall be created and approved within 24 hours of the verbal approval. In New York, exceptional cases are approved by the Chief of General Operations or the Travel Services Section Manager, General Operations, Bureau for Management Services. Outside of New York, the Resident Representative, their deputy, or the Head of Regional Bureau must approve exceptions. In such cases, subsequent written confirmation is required by the staff member's supervisor.

# Delegation of Authority

10. The authorizer can delegate the role of travel approver if this is done formally in writing and understood and accepted in writing by the person who is delegated. The written delegation should include a description of the authorities being delegated, effective date of the delegation and any specific limitations imposed including restrictions on further delegation. Duty travel should not be authorized by an official reporting to the traveller, with the exception of the Administrator’s travel, which is authorized by the Associate Administrator.

**Under no circumstances shall a staff member authorize or process his/her own travel.**

# Travel of Individual Contractors (IC) and Non-staff Members

1. ICs, or consultants, are not UN/UNDP staff members, if travel is required in their Terms of Reference then their remuneration should also cover their travel costs. The IC agreement should spell out in detail the responsibilities of the parties and how the travel should be compensated, arranged, and facilitated. ICs are not covered by Appendix D of the Staff Rules and should make their own travel insurance arrangements. Please refer to the IC policy under Procurement section. In the event that an IC must undertake duty travel paid by the organization, the policy and procedures outlined herewith apply. The policy detailing the route mode and standard of accommodation established for the contract modality should be referred to in the event that travel arrangements need to be made for ICs or other non-staff members (Service Contract holders; Government Officials, pro bono service providers, etc.). When UNDP pays and organizes duty travel it shall be on the basis of the standards established in POPP.
2. Group Travel Option

For one-time workshop participants of 20 or more who are non-staff members that do not hold a Service Contract and when:

- the total travel payment (e.g. DSA and/or terminal expense) for individual participants are less than $500

- UNDP provides conference organization services to, partners, donors and other UN agencies, and is requested by these donors/UN agencies to affect a payment to participants in cash at a location where banking services are not available

- partners, donors and UN Agencies do not mandate the payment of a travel advance (80%) with the balance (20%) processed post travel through a travel claim

For workshops that meet the standard outlined above it is not compulsory to process the travel through the T&E module of UNall/Quantum. Offices should seek bank cash delivery options where available. In the absence of a bank delivery option the [Project Cash Advance](https://popp.undp.org/node/11346) arrangement can be followed.

With the aim to reduce costs as well as the adminstrative burden, offices should treat group travel of 20 or more participants as a separate project and plan accordingly. The workshop planning should include the identification and contracting of the venue and negotiation of preferential rates, the cost savings of which will be passed on to UNDP.

1. Travel approval through the T&E module of UNall/Quantum has two steps:
2. Create and process the TR\*
3. Approve the request

\*TR creation can be done by the traveler or the travel arranger (who may also be the travel processor)

Direct payment requests from Government and UN Agencies where travel is not organized by UNDP should be processed outside of the T&E module of UNall/Quantum.

The IDAM is used for access rights

# Approval of Travel

1. The TR should contain, at minimum, the following information:
	1. Name, index # (if available) and vendor # (if processing a payment electronically) of traveller;
	2. Purpose of travel;
	3. authorized itinerary; and preferred (by traveller) itinerary;
	4. Dates of official business;
	5. Ticket cost (if any);
	6. Mode of transportation;
	7. Travel advance if any (DSA; terminal, etc.);

Chart of accounts (COA).

1. For each authorized mission, an approved travel request will be obtained prior to finalizing travel arrangements (issuing tickets, DSA and travel advance).

1. Once the authorizing unit fully approves the TR in the T&E module, the authorization is sent to a travel agency for ticket issuance. The system also issues the travel advance, where applicable, by electronic fund transfer (EFT) within seven (7) calendar days prior to the start date of the travel.

1. Regardless of where the TR originates, a copy of the travel authorization is given to the traveller.

1. The procedures for creating, approving, modifying or canceling a TR in the UNall/Quantum are detailed in the

 [UNALL/Quantum user guide](https://eur03.safelinks.protection.outlook.com/ap/b-59584e83/?url=https%3A%2F%2Fundp.sharepoint.com%2F%3Ab%3A%2Fr%2Fsites%2FNextGenERP%2FShared%2520Documents%2FGeneral%2F3%2520Realization%2FTrain%2520The%2520Trainer%2FFinance%2FTravel%2FTravel%2520and%2520Expense%2520UserGuide_V%25205.0.pdf%3Fcsf%3D1%26web%3D1%26e%3DZZChKg&data=05%7C01%7Csavita.ahmed%40undp.org%7C6ee759788aa344d8cec608dae2bd90a5%7Cb3e5db5e2944483799f57488ace54319%7C0%7C0%7C638071601059744186%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=HyRrtNrq0dfZVm60ul2hFh%2F%2BMyXEOvaaWBJ0f7SWtbU%3D&reserved=0)

# Mixing Business Travel with Personal Travel

21. When official travel is combined with personal travel, the TR must identify both the “authorized itinerary” and the “preferred itinerary”. At HQ in New York, if approved, the travel agency issues the requested ticketing and collects directly from the traveller any additional costs resulting from the deviation, where allowed by the carrier. In the COs if additional costs are incurred as a result of personal travel they are paid directly to the travel agency or reimbursed by the traveller to UNDP.

**Roles and Responsibilities**

|  |  |
| --- | --- |
| **ROLES**  | **RESPONSIBILITIES**  |
| Traveller  | * Agree travel requirements with their manager prior to requesting the initiation of a travel request. Detail the travel requirement in order for a travel request to be raised. The travel requirement should include the latest possible arrival and the earliest possible departure time and preferred mode of travel. The agreement should be recorded in writing or captured electronically.
* Obtain his/her supervisor’s clearance if traveling for another unit or CO.
* Create the travel request (optional).

  |
| Travel Processor | * Create the travel request (if the traveller has not already done so).
* Process travel request.
* Application of the travel policy. Ensures the request adheres to the route, mode and standard of accommodation and Daily Subsistence Allowance (DSA) guidelines.
* Validates the Chart of Accounts (COA) is correct, ensuring sufficient funds are available in the budget.
* Use of funds is appropriate and allowable.
* Confirms the request reflects the travel requirement provided by the traveller.

  |
| Approver | * Approves the validity of travel as official and authorized.
* Validates the travel requirement is based upon the latest possible arrival and the earliest possible departure time.
* Approves delegations of two or more staff in a similar substantive role, per Bureau to participate in UN meetings.1
* Certifies that there are no alternative means which are feasible to meet the objectives of the proposed travel.
* Responsible for controlling the level of travel in accordance with budget and greening goals.
* Confirms usage of COA
 |
| Notes  | * The level one (Travel Processor) and level two (Approver) approval role must be fulfilled by a different individual.
* A traveler can submit but cannot process or approve their own travel request
* A staff member traveling for another unit shall obtain his/her supervisor’s clearance
 |

1 If the approver is not the head of the Bureau the approver should obtain the approval from the Bureau Head.

**Templates and Forms**

[[UNALL/Quantum user guide](https://popp.undp.org/_Layouts/15/POPPOpenDoc.aspx?ID=POPP-11-3379)](https://eur03.safelinks.protection.outlook.com/ap/b-59584e83/?url=https%3A%2F%2Fundp.sharepoint.com%2F%3Ab%3A%2Fr%2Fsites%2FNextGenERP%2FShared%2520Documents%2FGeneral%2F3%2520Realization%2FTrain%2520The%2520Trainer%2FFinance%2FTravel%2FTravel%2520and%2520Expense%2520UserGuide_V%25205.0.pdf%3Fcsf%3D1%26web%3D1%26e%3DZZChKg&data=05%7C01%7Csavita.ahmed%40undp.org%7C6ee759788aa344d8cec608dae2bd90a5%7Cb3e5db5e2944483799f57488ace54319%7C0%7C0%7C638071601059744186%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=HyRrtNrq0dfZVm60ul2hFh%2F%2BMyXEOvaaWBJ0f7SWtbU%3D&reserved=0)