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# **TRAVEL POLICY**

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**BY:**

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# **\*\*[Institution/Organization Name] Travel Policy\*\***

## **INTRODUCTION:**

The [Institution/Organization Name] Travel Policy is designed to provide clear guidelines and procedures for employees who are required to travel on behalf of the organization. By adhering to this policy, employees can ensure compliance with company standards and proper management of travel-related expenses.

## **DEFINITION:**

- **Accommodation:** Accommodation refers to the lodging or housing arrangements made for travelers. This includes hotels, motels, inns, or other facilities where travelers stay overnight during their trips. In a travel policy, accommodation guidelines often cover acceptable types of lodging, spending limits, and reimbursement procedures.
- **Agent:** An agent in the context of travel policy is a person or company authorized to book and manage travel arrangements on behalf of an organization or individual. Travel agents handle tasks such as securing flights, accommodation, car rentals, and other travel services.
- **Bookings:** Bookings refer to the reservations made for travel services, including flights, accommodations, car rentals, and other transportation or activities. The travel policy usually outlines the preferred methods and channels for making these bookings, as well as any required approvals.
- **Budget:** Budget refers to the allocated funds set aside for travel-related expenses. The travel policy specifies budget limits for various travel components, such as airfare, accommodation, meals, and other incidental expenses, ensuring that travel expenditures remain within the financial constraints of the organization.
- **Cost:** Cost represents the monetary amount required for travel-related services and activities. This includes the total expenses incurred for transportation, accommodation, meals, and other incidentals. The travel

policy outlines acceptable costs and the process for managing and reporting these expenses.

- **Documentation:** Documentation includes all the necessary paperwork and electronic records related to travel. This encompasses travel itineraries, receipts, invoices, boarding passes, hotel confirmations, and any other documents required for reimbursement or compliance with the travel policy.
- **Expenses:** Expenses refer to the costs incurred by travelers during their trip. These can include transportation, accommodation, meals, entertainment, and other incidentals. The travel policy outlines which expenses are reimbursable, the limits for each type of expense, and the required process for expense reporting.
- **Meals:** Meals refer to the food and beverages consumed by travelers during their trip. The travel policy often specifies per diem rates or allowable amounts for meal expenses, and may also include guidelines for when and how meal expenses can be reimbursed.
- **Reimbursement:** Reimbursement is the process of compensating travelers for out-of-pocket expenses incurred during their trip. The travel policy outlines the procedures for submitting expense reports, required documentation, and the timeline for reimbursement.
- **Transportation:** Transportation refers to the various modes of travel used by individuals to reach their destinations. This includes air travel, trains, buses, car rentals, and other forms of transport. The travel policy provides guidelines on acceptable transportation options, class of service, and cost management.
- **Travel:** Travel encompasses the act of moving from one location to another, typically over a distance, for business or personal reasons. In a travel policy, travel includes the planning, booking, and execution of trips, as well as the management of related expenses and adherence to policy guidelines.

- **Safety:** Safety in the context of travel policy refers to the measures and precautions taken to ensure the well-being and security of travelers. This includes guidelines on safe travel practices, emergency procedures, health and safety advisories, and protocols for responding to incidents or risks encountered during travel.

#### **PURPOSE:**

The purpose of this Travel Policy is to establish guidelines for all business travel undertaken on behalf of [Institution/Organization Name]. This policy aims to ensure that travel is conducted efficiently, safely, and in a cost-effective manner, aligning with the company's goals and budget. It outlines the procedures, guidelines, and responsibilities associated with business travel.

#### **SCOPE:**

This policy applies to all employees, contractors, and representatives of [Institution/Organization Name] who are required to travel for business purposes.

#### **POLICY:**

##### **1. Travel Authorization:**

- All business travel must be authorized in advance by the respective department head or supervisor.
- A travel request form, detailing the purpose, destination, duration, and estimated costs of the trip, must be submitted and approved prior to booking any travel arrangements.

##### **2. Booking & Travel Arrangements:**

- Travel bookings, including flights, accommodation, and transportation, should be made through the designated travel booking system or approved travel agency/ empaneled agent.
- Employees are encouraged to book in advance to secure the best rates, while adhering to the company's travel budget guidelines.
- Employees should choose the most economical and practical means of travel, considering both cost and time efficient for the interest of the interest of the entity.

### **3. Travel Expenses:**

- Air Travel: Economy class must be used for all domestic and international flights unless pre-approved by senior management for exceptional circumstances.
- Ground Transportation: Use of rental cars, taxis, ridesharing services, and public transportation should be guided by cost-effectiveness and convenience. Employees should opt for standard or mid-size cars unless a larger vehicle is necessary.
- Accommodation: Employees should choose reasonably priced accommodations, preferably those with corporate rates negotiated by [Institution/Organization Name]. Preferred accommodation options, where available, should be selected to ensure safety and comfort.
- Meals and Incidental Expenses: Reimbursement for meals and incidental expenses will be based on actual costs, supported by receipts, and should not exceed the daily limits set by [Institution/Organization Name].

### **4. Travel Advances and Reimbursement:**

- Employees may request travel advances for anticipated expenses. Requests must be approved by the appropriate authority.
- Employees are required to submit accurate expense reports, including original receipts and a detailed account of expenses, must be submitted within 1 month of completing the trip.
- Reimbursements will be processed promptly, provided that all expenses comply with this policy and are properly documented.
- Only reasonable and necessary expenses incurred during the trip will be reimbursed, in accordance with company policy.

### **5. Travel Insurance:**

- [Institution/Organization Name] provides travel insurance coverage for employees traveling on approved business trips.
- Employees are responsible for familiarizing themselves with the coverage limits and exclusions of the travel insurance policy.
- In case of an emergency, employees should contact the insurance provider immediately and notify their supervisor.

## **6. Health and Safety:**

- Employees should prioritize their health and safety while traveling and adhere to any travel advisories or guidelines issued by relevant authorities.
- [Institution/Organization Name] may provide additional support or resources to ensure the well-being of employees during travel.

## **7. Personal Travel:**

- Combining personal travel with business travel is permissible, but any additional costs incurred due to personal travel will not be covered by [Institution/Organization Name]
- Employees must clearly differentiate between business and personal expenses in their expense reports.

## **8. Compliance, Documentation and Accountability:**

- All travel expenses must be accurately documented and submitted in accordance with company policy.
- Employees are expected to comply with this Travel Policy. Non-compliance may result in disciplinary actions, including the denial of reimbursement for unauthorized expenses.
- Managers and supervisors are responsible for ensuring their team members understand and adhere to this policy.

## **REVIEW AND REVISION:**

This travel policy will be reviewed annually and revised as necessary to ensure its effectiveness and relevance to [Institution/Organization Name]'s business needs.