**International Business travel for PGRs - Faculty Guidance Note**

### Executive Summary

Many activities of the University involve business travel of some kind. This Faculty guidance note provides information on what to do in preparation for International business travel. For the purposes of this document International travel refers to all travel outside of the UK. It provides general guidance on international business travel such as logging travel details, travel insurance, emergency contact details, as well as explaining when a detailed risk assessment may be required.

Section 1 of the guidance note explains: who is responsible for your health and safety whilst you are travelling; the procedure for recording the details of your trip and what to do in an emergency.

Section 2 of the guidance note runs through some of the basic ‘do and don’ts’ of the University’s travel insurance policy.

Section 3 of the guidance note explains through written examples and a flow chart when you would need to complete a risk assessment in addition to the International Business travel form. In this section there are also links to all of the forms mentioned in this guidance note as well as useful websites.

### General considerations

### Who has responsibility for Health and Safety when I travel?

Primary responsibility lies with the University which in turn is delegated through line management to the Faculty and to key members of staff identified as having duties for arranging, facilitating or administering travel for your Faculty. As a PGR student you are classified as a member of staff for the purposes of health and safety guidance. Your line manager is your main supervisor. When undertaking travel, you have a responsibility to take reasonable care in your activities and practices and must acknowledge your own responsibilities for the health and safety of yourself and others.

### Logging of itinerary and contact details

*Travel details, who knows where you are and how to contact you?*

The PGR International Business Travel form should be used to record details of all international travel. This must be completed in advance of all international travel as approval from your main supervisor (as your line manager) is required. The information supplied will enable the Faculty to help to co-ordinate assistance for you in the case of loss or injury.

The Faculty requires you to leave a copy of your completed form with the FOS team member for Internationalisation – Claire Wilkins (Internationalisation@soton.ac.uk, extn: 27715, Room 3011, Bdg 65a). Any details you are not sure about Claire will help you with as she will be involved in helping to arrange your travel.

The FOS team member for Internationalisation (see above) will keep a copy of your completed form and you will need to take a copy with you.

Whilst on your trip, you should make contact with either the FOS team member for Internationalisation or your line manager (main supervisor) at a reasonable time soon after you have arrived. If you are away for a long period then it is advisable to make contact at reasonably regular intervals to advise on your well-being and any changes to your itinerary

### Health status for travel

There may be certain considerations as part of your travel plan that you need to check against. For example, do you have medical conditions that may prohibit you from long haul flights or do you require vaccinations to safely visit a particular area? You should consider these and consult your GP for advice.

### Incidents/Accidents

If you experience an emergency incident whilst on business travel – you must contact the numbers identified in the insurance details section of the PGR Student International Business Travel Form which you will be required to complete before travelling. If emergency recovery is attained via the insurance cover PGR students must report to the Faculty as soon as convenient.

### Insurance

All international business travel is covered by the University’s insurance policy but it is the traveller’s responsibility to check they are adequately covered by the policy. For example, ensuring medical insurance cover provided is sufficient for the location and type of activity, especially for non-European countries. Failure to complete the necessary paperwork (including an off-site risk assessment if required) could result in any claims on the policy being refused.

Check the summary of cover available here:

<https://sotonac.sharepoint.com/teams/FinancePlanningandAnalytics/SitePages/insurance-travel-and-personal-accident-landing-page.aspx?web=1>

If in doubt check with the insurance office directly: [insure@soton.ac.uk](mailto:insure@soton.ac.uk) *PGRs must:*

* Ensure that they take a summary of cover and emergency contact details with them (available from insurance web page)
* Ensure that they comply with Faculty transport and driving procedures, including driver training and licensing.
* Ensure that adequate insurance cover that meets destination legal requirements is provided for the type of transport used; again refer to insurance web page indicated above
* When using their own car for any business travel (local, national or international) staff should ensure that any personal car insurance includes provision for business use
* After long haul flights, staff and students should not drive motor vehicles on arrival: taxis, public transport or other travel means should be used

Staff and students undertaking flights of over 6 hours should, where practicable, ensure that a rest day is taken on arrival. This also applies on return to the UK.

### Risk assessment requirements

Please refer to the business travel and risk assessment flow charts below as well as the following guidance as it will inform you of risk assessment requirements for different types of travel.

### Routine travel

Travelling to lectures, visits, meetings, conferences and other similar events as part of University business, using established modes of transport is considered routine. The transport could be either commercial (bus, train, plane) or an individual’s private car.

There is not normally a requirement to carry out a risk assessment for routine travel. However, it is vital that all travel is planned sufficiently in advance of the intended departure to allow key personnel to consider the proposal in suitable detail and approve it at an appropriate level. The effort and detail required in planning travel is largely commensurate with the risks identified. A detailed travel plan may also be necessary when travelling overseas for example.

### Non-routine travel

There will be many activities as part of research or teaching that involve a more hazardous means of transport. This could be using non-standard modes of transport , especially in under developed locations, remote areas off-road either in the UK or overseas, or travelling in areas of political instability that are not recommended when checking against the Foreign and Commonwealth travel website. These non-routine travel activities should be risk assessed as part of the whole activity to which it relates using the University off-site risk assessment form.

### Travel with students

If you are going off site with a group or individual students there are certain factors to consider which you may not have to consider when travelling alone. It is best practice to communicate with the students about the travel arrangements and meeting points, to have a way of communicating with all of the students if the situation changes unexpectedly. Wherever possible be aware of any medical conditions that any of the students may have. Remember you will need to make sure that your personal car insurance policy covers you for business use if you are giving students a lift anywhere.

### Travel Filter Chart

Some examples of travel activities are provided below together with likely requirements in terms of logging itinerary and the need for a risk assessment in addition to the International Business travel form.

|  |  |  |
| --- | --- | --- |
| **Nature of travel** | **Travel detail** | **Risk assessment required** |
| **Routine travel examples – staff travelling only** | | |
| Meeting/conference/training attendance within UK, return same day | Not required | Typically not required\* |
| Meeting/conference/training attendance within UK, includes one or more overnight stays | Inform line manager (main supervisor) | Typically not required\* |
| Meeting/conference/training attendance in developed location outside of UK | Complete business travel form and send to Faculty contact. Inform line manager (main supervisor) | Typically not required\* |
| Meeting / conference in under developed location outside of UK | As above | Off-site working risk assessment required. |
| **Non-routine travel examples – staff travelling only** | | |
| Travel/Fieldwork in under developed locations, remote areas off-road (Overseas and UK), areas of political instability. | Consult with line manager (main supervisor). Complete business travel form and send to Faculty contact. | Off-site working risk assessment required. |
| Hosted research or work placement overseas | As above | Off-site working risk assessment required. |
| Travel to areas against advice of Foreign and Commonwealth Office (FCO) | As above | Off-site working risk assessment required. Approval needed from vice-chancellors office |
| **Routine travel – with students\*** | | |
| Visit to a place of study/interest within UK, return same day using public transport or own car | Not required | Travel plan to be communicated with group\* |
| Visit to a place of study/interest within UK within UK, includes one or more overnight stays | Inform line manager (main supervisor) | General risk assessment required\* |
| Supervised Summer schools in a developed location outside of the UK | Consult with line manager (main supervisor). Complete business travel form and send to Faculty contact. | Off-site working risk assessment required. |
| Travel/Fieldwork in under developed locations, remote areas off-road (Overseas and UK) | As above | Off-site working risk assessment required. |

\* ‘Students’ is a general term in this context and refers to all students in the member of staff’s care. Students can also refer to undergraduates being supervised by postgraduates

These examples are not exhaustive and are for guidance only. If significant risks are considered to be present in any activity then a risk assessment must be completed. If you are in any doubt, contact the Faculty Safety Officer – Aloma Hack at [A.J.Hack@soton.ac.uk](mailto:A.J.Hack@soton.ac.uk) with a brief description of the proposed travel and the activity to be undertaken at your destination.

### Useful links

### Websites

University’s insurance website

<https://www.southampton.ac.uk/finance/services/travel-and-personal-accident.page>

Foreign Office Website

<https://www.gov.uk/foreign-travel-advice>

### Forms

*PGR International Business Travel Form*

The electronic version of this can be found here: <https://www.southampton.ac.uk/doctoral-college/researcher-resources/handbook/fah/facilities.page>

*Off site working risk assessment Form* and *generic risk assessment template*

The electronic versions of these can be found on the Health and Safety Intranet site:

<https://sotonac.sharepoint.com/teams/HealthSafetyRisk/SitePages/Risk-Assessment.aspx>

### Business travel and risk assessment flow diagram

**Does FCO advise against travel?**

**NO**

**Contact University Insurance office and obtain approval from Dean/Directors of Faculty/Service**

**Obtain Insurance cover details**

**YES**

**Ensure an off-site working risk assessment is carried out**

**Check travel advice for destination at FCO website**

**Complete a Business travel form and an off –site working risk assessment form**

**Complete a Business travel form and an off –site working risk assessment form**

**Read the International Business travel guidance note.**

**A Business travel form should be completed for all international travel. Log Leave completed form with FOS team member (Lisa Bryan).**

**If the nature of the research/placement is hazardous then an off-site working risk assessment should also be completed.**

**Obtain assurance and checks from host institution that appropriate Health and Safety arrangements are in place.**

**Read the International Business travel guidance note.**

**A Business travel form should be completed for all international travel.**

**Leave completed form with FOS team member (Lisa Bryan).**

**A documented risk assessment is not normally required**